Oracle® Financial Services Lending and Leasing

OAS Installation Guide

Release 14.12.0.0.0
F82269-01
August 2024

Oracle Financial Services Lending and Leasing OAS Installation Guide, Release 14.12.0.0.0

F82269-01

Copyright © 2022, 2024, Oracle and/or its affiliates.

This software and related documentation are provided under a license agreement containing restrictions on use and disclosure and are protected by intellectual property laws. Except as expressly permitted in your license agreement or allowed by law, you may not use, copy, reproduce, translate, broadcast, modify, license, transmit, distribute, exhibit, perform, publish, or display any part, in any form, or by any means. Reverse engineering, disassembly, or decompilation of this software, unless required by law for interoperability, is prohibited.

The information contained herein is subject to change without notice and is not warranted to be error-free. If you find any errors, please report them to us in writing.

If this is software, software documentation, data (as defined in the Federal Acquisition Regulation), or related documentation that is delivered to the U.S. Government or anyone licensing it on behalf of the U.S. Government, then the following notice is applicable:

U.S. GOVERNMENT END USERS: Oracle programs (including any operating system, integrated software, any programs embedded, installed, or activated on delivered hardware, and modifications of such programs) and Oracle computer documentation or other Oracle data delivered to or accessed by U.S. Government end users are "commercial computer software," "commercial computer software documentation," or "limited rights data" pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, the use, reproduction, duplication, release, display, disclosure, modification, preparation of derivative works, and/or adaptation of i) Oracle programs (including any operating system, integrated software, any programs embedded, installed, or activated on delivered hardware, and modifications of such programs), ii) Oracle computer documentation and/or iii) other Oracle data, is subject to the rights and limitations specified in the license contained in the applicable contract. The terms governing the U.S. Government's use of Oracle cloud services are defined by the applicable contract for such services. No other rights are granted to the U.S. Government.

This software or hardware is developed for general use in a variety of information management applications. It is not developed or intended for use in any inherently dangerous applications, including applications that may create a risk of personal injury. If you use this software or hardware in dangerous applications, then you shall be responsible to take all appropriate fail-safe, backup, redundancy, and other measures to ensure its safe use. Oracle Corporation and its affiliates disclaim any liability for any damages caused by use of this software or hardware in dangerous applications.

Oracle®, Java, MySQL, and NetSuite are registered trademarks of Oracle and/or its affiliates. Other names may be trademarks of their respective owners.

Intel and Intel Inside are trademarks or registered trademarks of Intel Corporation. All SPARC trademarks are used under license and are trademarks or registered trademarks of SPARC International, Inc. AMD, Epyc, and the AMD logo are trademarks or registered trademarks of Advanced Micro Devices. UNIX is a registered trademark of The Open Group.

This software or hardware and documentation may provide access to or information about content, products, and services from third parties. Oracle Corporation and its affiliates are not responsible for and expressly disclaim all warranties of any kind with respect to third-party content, products, and services unless otherwise set forth in an applicable agreement between you and Oracle. Oracle Corporation and its affiliates will not be responsible for any loss, costs, or damages incurred due to your access to or use of third-party content, products, or services, except as set forth in an applicable agreement between you and Oracle.

Contents

Preface

Prerequisites iv
Audience v
Documentation Accessibility v
Diversity and Inclusion v
Conventions v

1 Install OA Publisher

1.1 Installing OA Publisher 1-1

2 Configure OA Publisher

2.1 Configuring OA Publisher 2-1
2.2 Verifying Successful OA Publisher Deployment 2-9

3 Create OA Publisher Datasource

3.1 Creating OA Publisher Datasource 3-1
3.2 Creating Roles 3-5
3.2.1 Creating WebLogic Application Role 3-5
3.2.2 Creating WebLogic Application Policies 3-8

4 Import Reports to OA Publisher Server

4.1 Importing Reports to OA Publisher Server 4-1

5 Configure MDB Mail Server

5.1 Configuring MDB Mail Server 5-1

Preface

This document contains notes and installation steps needed to install and Configure Oracle Analytics Publisher. Oracle Financial Services Lending and Leasing relies on this software to configure reports and this document is in no way meant to replace Oracle documentation supplied with this Oracle product or available via Oracle technical support. The purpose of this document is only meant to supplement the Oracle documentation and to provide Oracle Financial Services Lending and Leasing specific installation instructions.

For recommendations on security configuration, refer Security Configuration Guide.

Oracle Analytics Publisher installation consists of the following steps.

- Installing OA Publisher
- Configuring OA Publisher
- Creating OA Publisher Datasource
- Importing Reports to OA Publisher Server
- Configuring MDB Mail Server

This section consists of the following topics:

- Prerequisites
- Audience
- Documentation Accessibility
- Diversity and Inclusion
- Conventions

Prerequisites

The following software are required to install Oracle Financial Services Lending and Leasing application and they are available from the following sources:

- Oracle Software Delivery Cloud (`http://edelivery.oracle.com/`)
- Oracle Technology Network (OTN)
    1. JDK Version 1.8.0_301 or above (https://www.oracle.com/technetwork/java/javase/downloads/jdk8-downloads-2133151.html)
    2. Oracle WebLogic Server 12c Version 12.2.1.4.0 (Fusion Middleware Infrastructure Installer) http://www.oracle.com/technetwork/middleware/weblogic/downloads/wls-main-097127.html
    3. The patches for Fusion Middleware 12.2.1.4.0 with the following patch number are to be applied - 30657796. However, this is required only for OAS Linux and can be ignored for OAS windows.

4. Oracle Analytic Server (OAS) 5.9.0 http://www.oracle.com/technetwork/middleware/bi-publisher/downloads/index.html

> **Note:**
>
> Please use all 64-bit software's for machine hosted with 64-bit O/S.

Audience

This document is intended for system administrators or application developers who are installing Oracle Financial Services Lending and Leasing Application.

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc.

Access to Oracle Support

Oracle customer access to and use of Oracle support services will be pursuant to the terms and conditions specified in their Oracle order for the applicable services.

Diversity and Inclusion

Oracle is fully committed to diversity and inclusion. Oracle respects and values having a diverse workforce that increases thought leadership and innovation. As part of our initiative to build a more inclusive culture that positively impacts our employees, customers, and partners, we are working to remove insensitive terms from our products and documentation. We are also mindful of the necessity to maintain compatibility with our customers' existing technologies and the need to ensure continuity of service as Oracle's offerings and industry standards evolve. Because of these technical constraints, our effort to remove insensitive terms is ongoing and will take time and external cooperation.

Conventions

The following conventions are used in this document:

Table 1 Conventions used

Term	Refers to
Home Directory/ $OFSLL_HOME	Oracle Financial Services Lending and Leasing Home Directory

1

Install OA Publisher

The following section explains the steps to install Oracle Analytics publisher.

- Installing OA Publisher

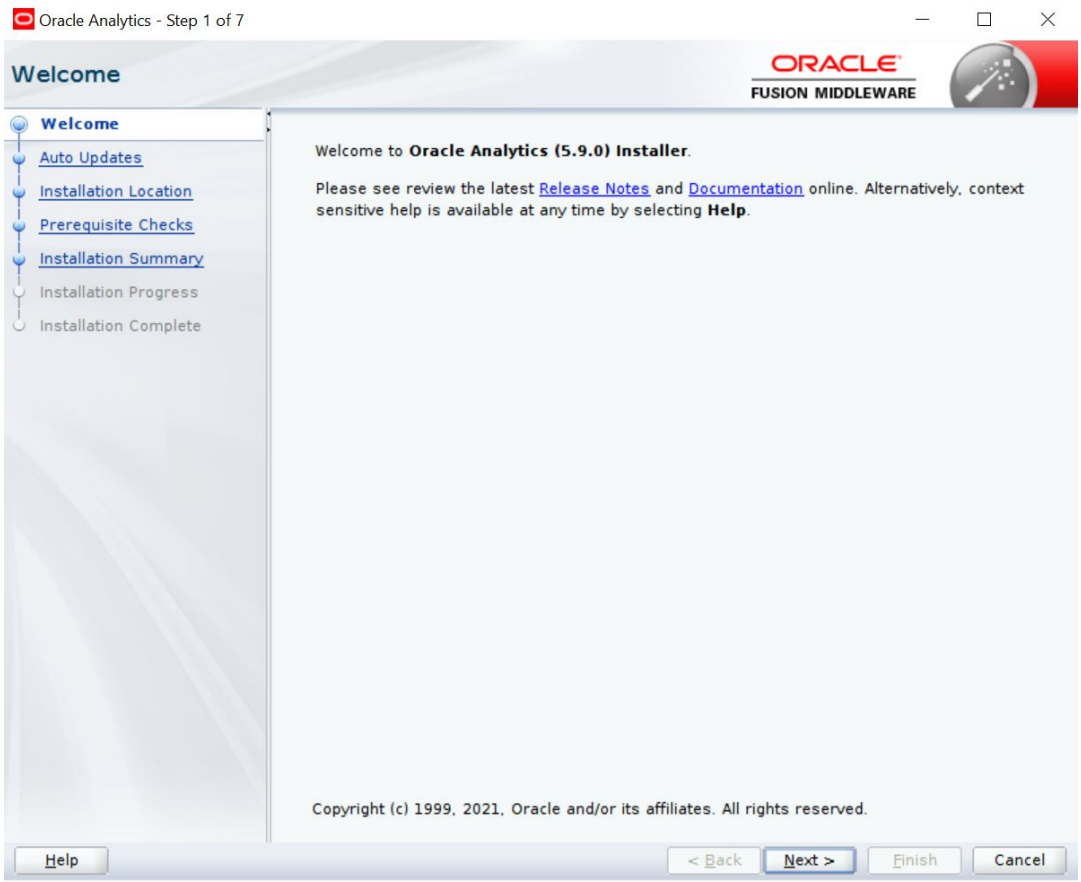
1.1 Installing OA Publisher

Follow the below steps to install Oracle Analytics publisher:

1. Download and unzip 'Oracle_Analytics_Server_Linux_5.9.0.zip'.
2. Navigate to `.jar` file location.
3. Run the command `java -jar Oracle_Analytics_Server_5.9.0.jar`

   The following window is displayed.

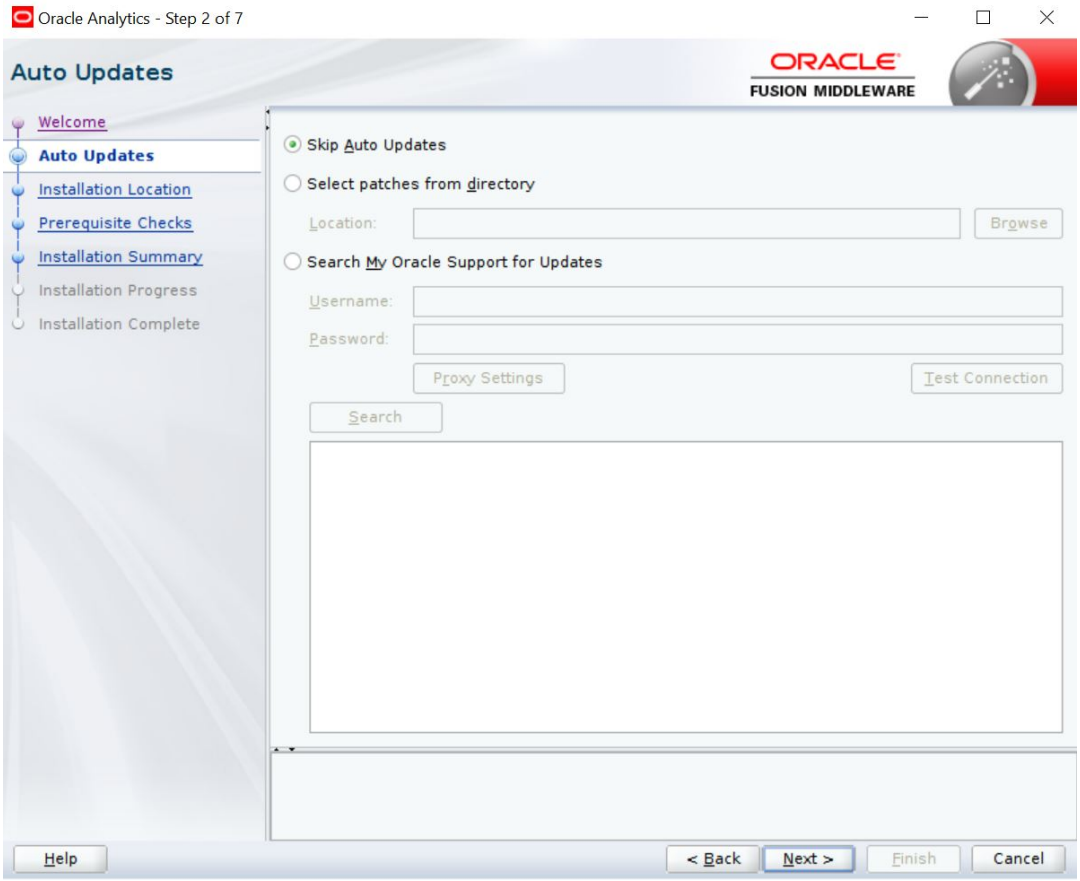
Figure 1-1 Oracle Analytics Installer window



4. Click **Next**.

   The following window is displayed.

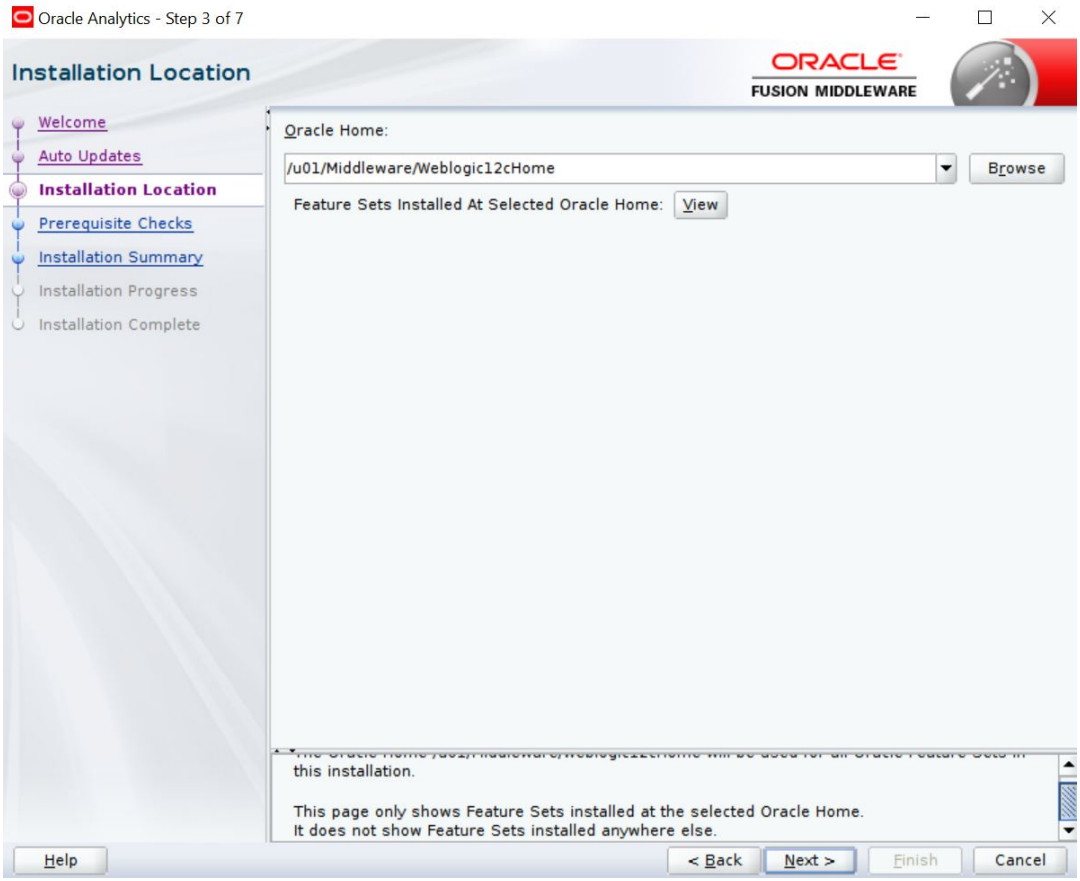
Figure 1-2 Auto Updates window



5. Select the option **Skip Software Updates**.
6. Click **Next**.

   The following window is displayed.

Figure 1-3 Installation Location

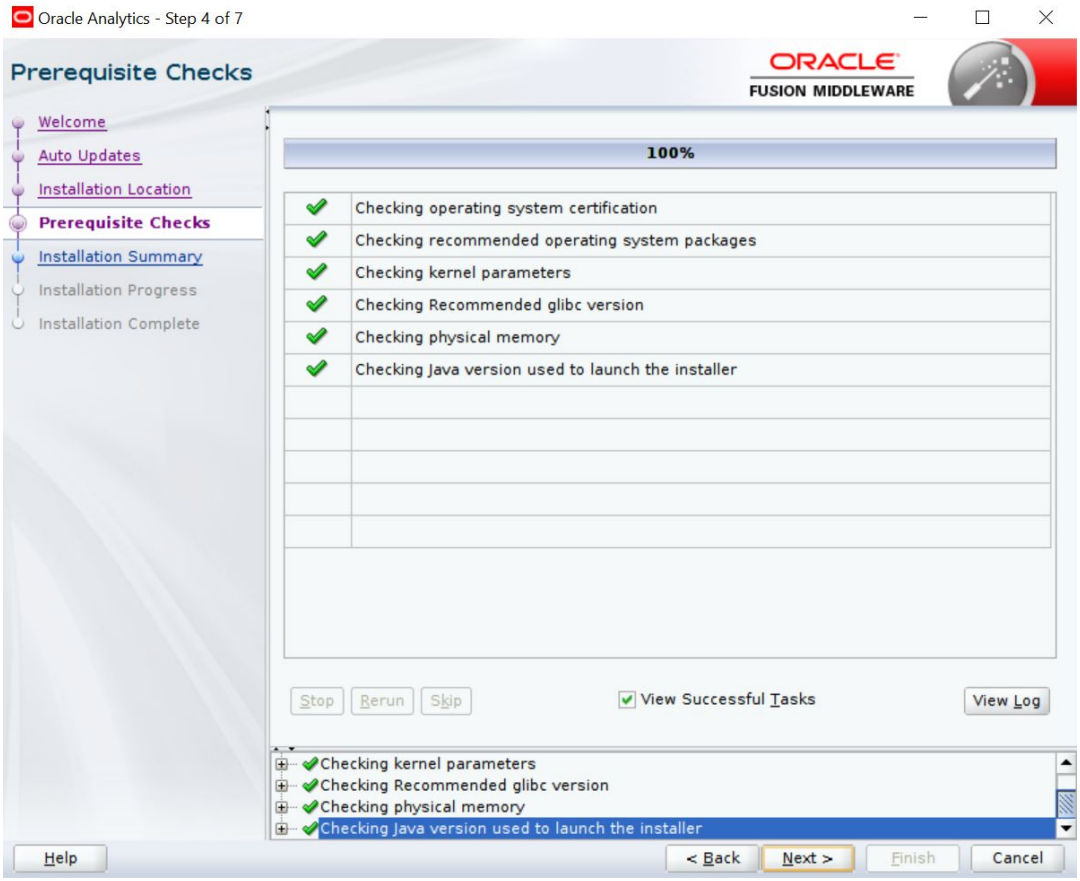


7. Browse Oracle Middleware Home path

   (for example `/u01/Middleware/Weblogic12cHome`) and click **Next**.

   The following window is displayed.

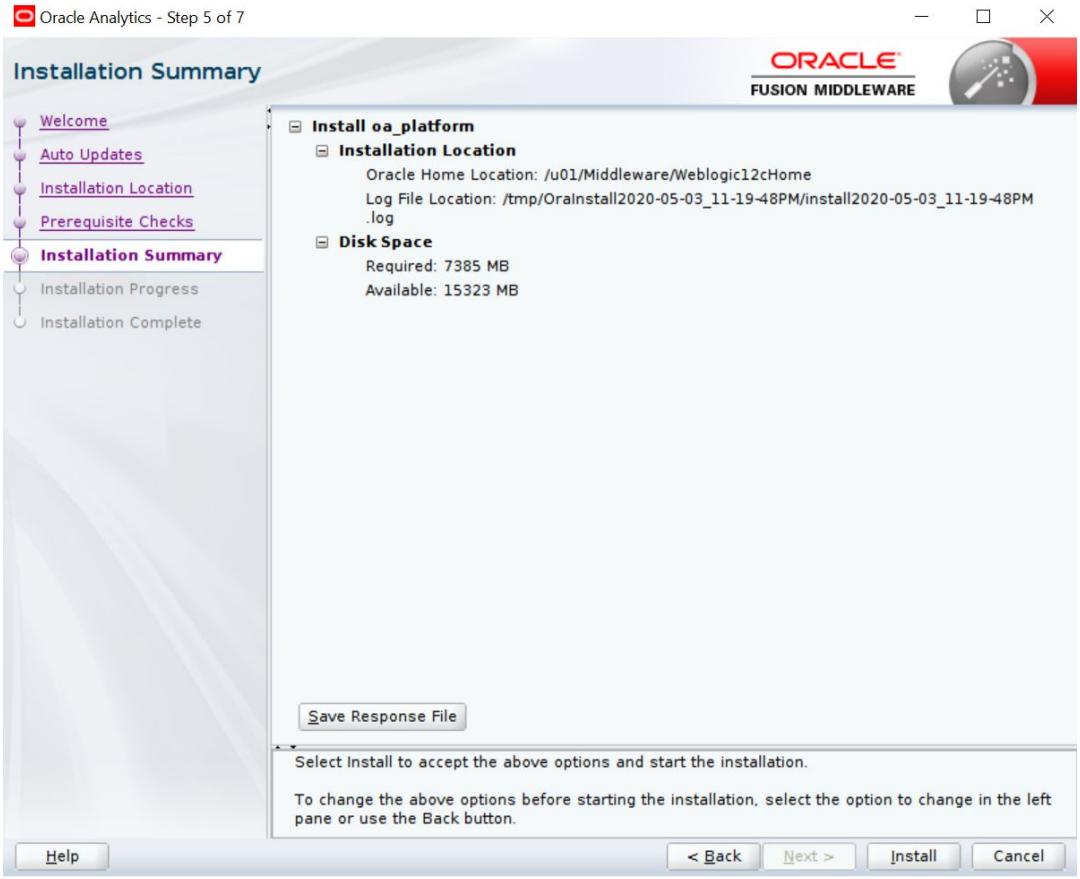
Figure 1-4 Prerequisite Check



8. Click **Next**.

   The following window is displayed.

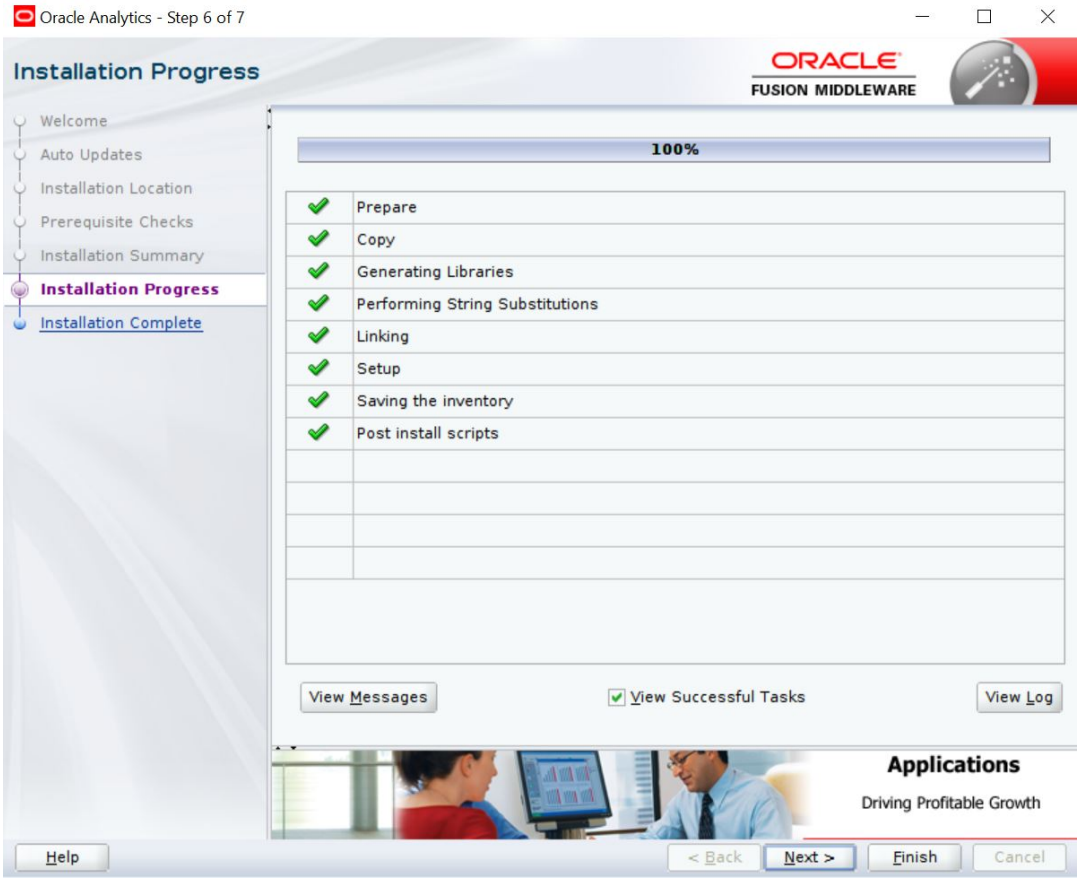
Figure 1-5 Installation Summary



9. Click **Install**.

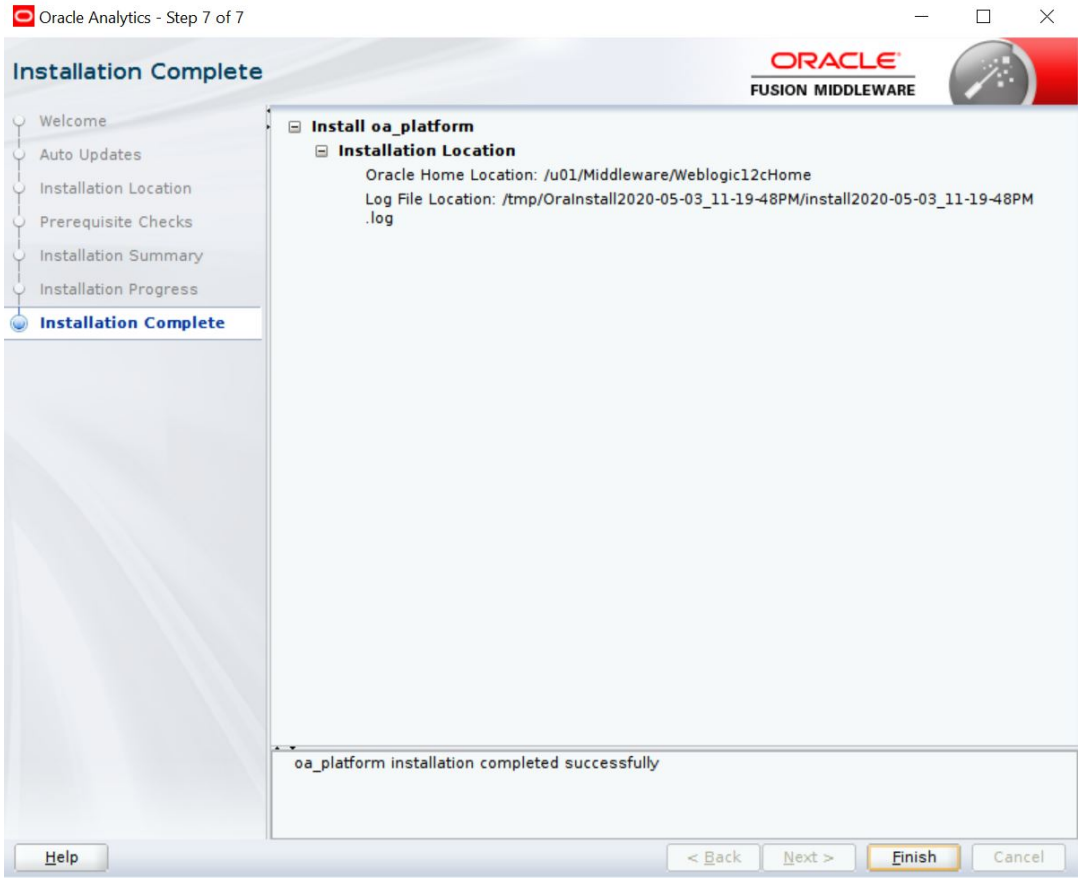
   The following window is displayed.

Figure 1-6 Installation Progress



10. Click **Next**. Once the installation is complete click **Finish** to close.

Figure 1-7 Installation Complete



2
Configure OA Publisher

The following sections details the steps to configure OA Publisher.

- Configuring OA Publisher
- Verifying Successful OA Publisher Deployment

2.1 Configuring OA Publisher

After installing OA Publisher, the next step is to configure OA Publisher.

To configure OA Publisher

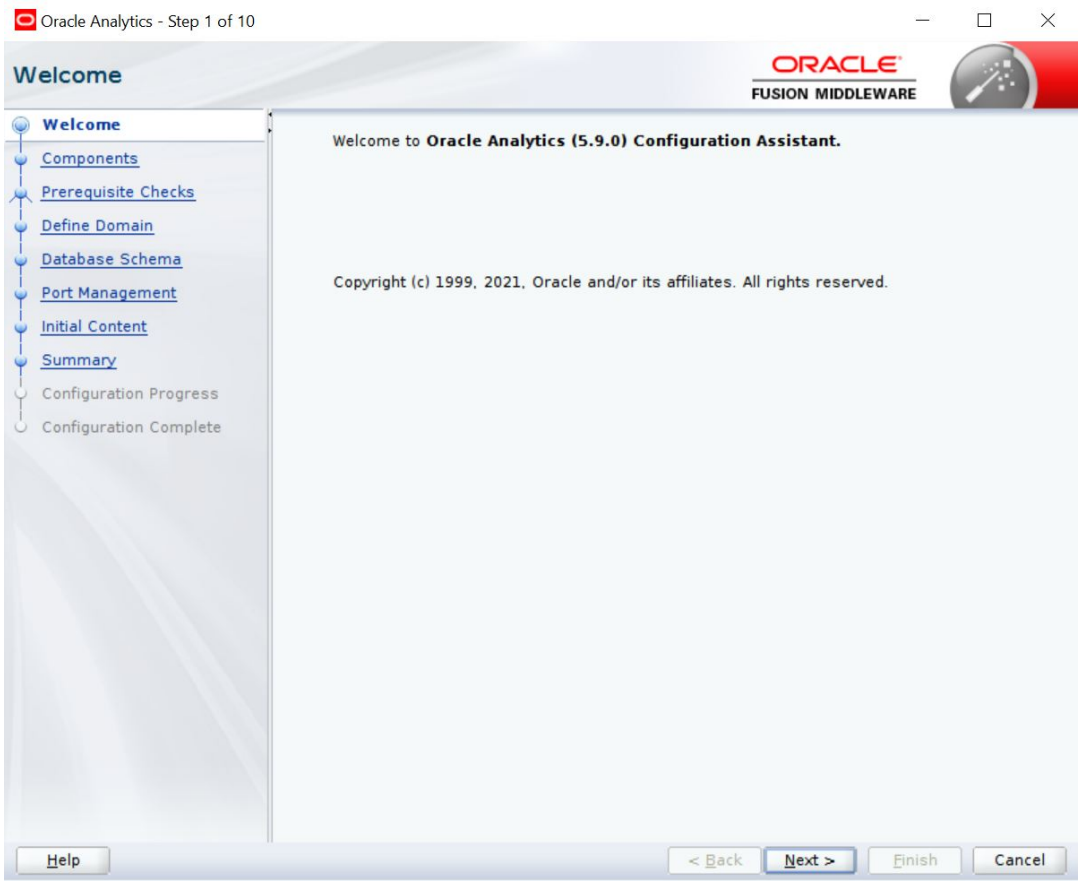
1. Launch configuration window and browse to `$BI_HOME/bin`

   (for example, BI_HOME is `/u01/Middleware/Weblogic12cHome/bi`).

2. Run `./config.sh`.

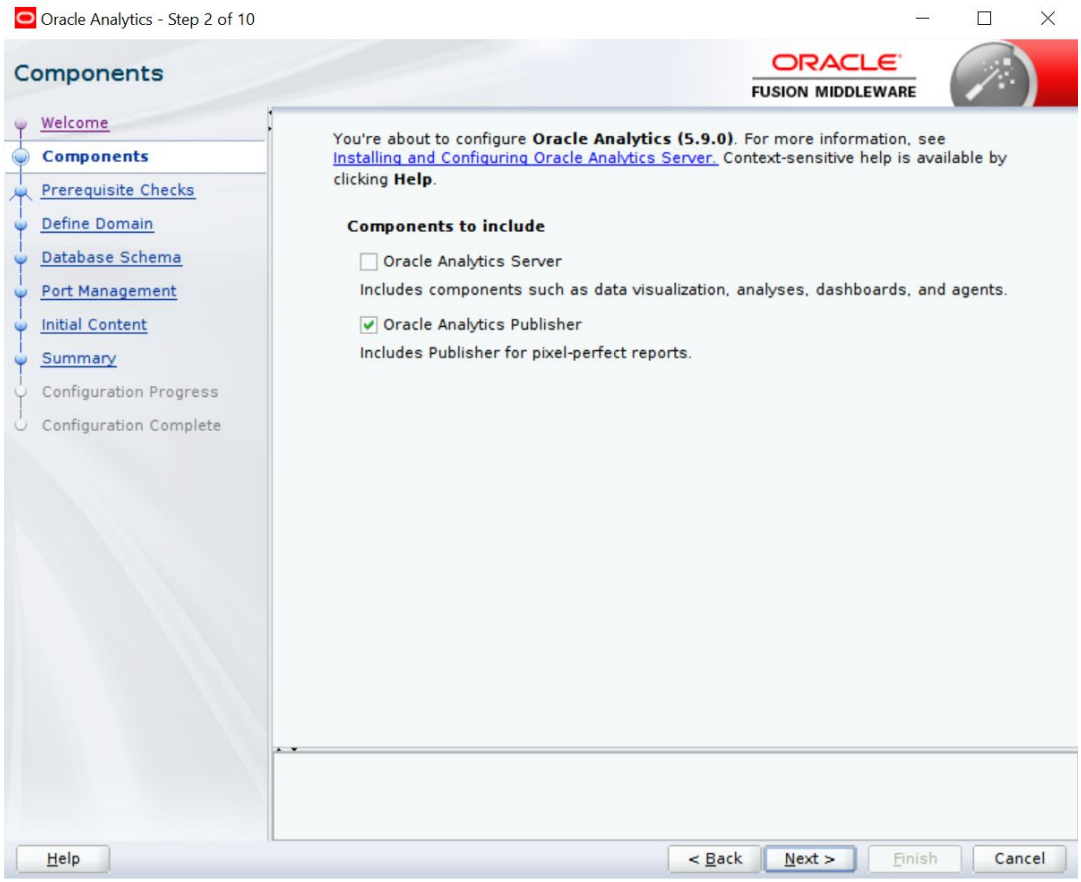
   The following window is displayed.

Figure 2-1 Oracle Analytics Configuration Assistant window



3. Select the option **Oracle Analytics Publisher** and Click **Next**.

Figure 2-2 Configuration



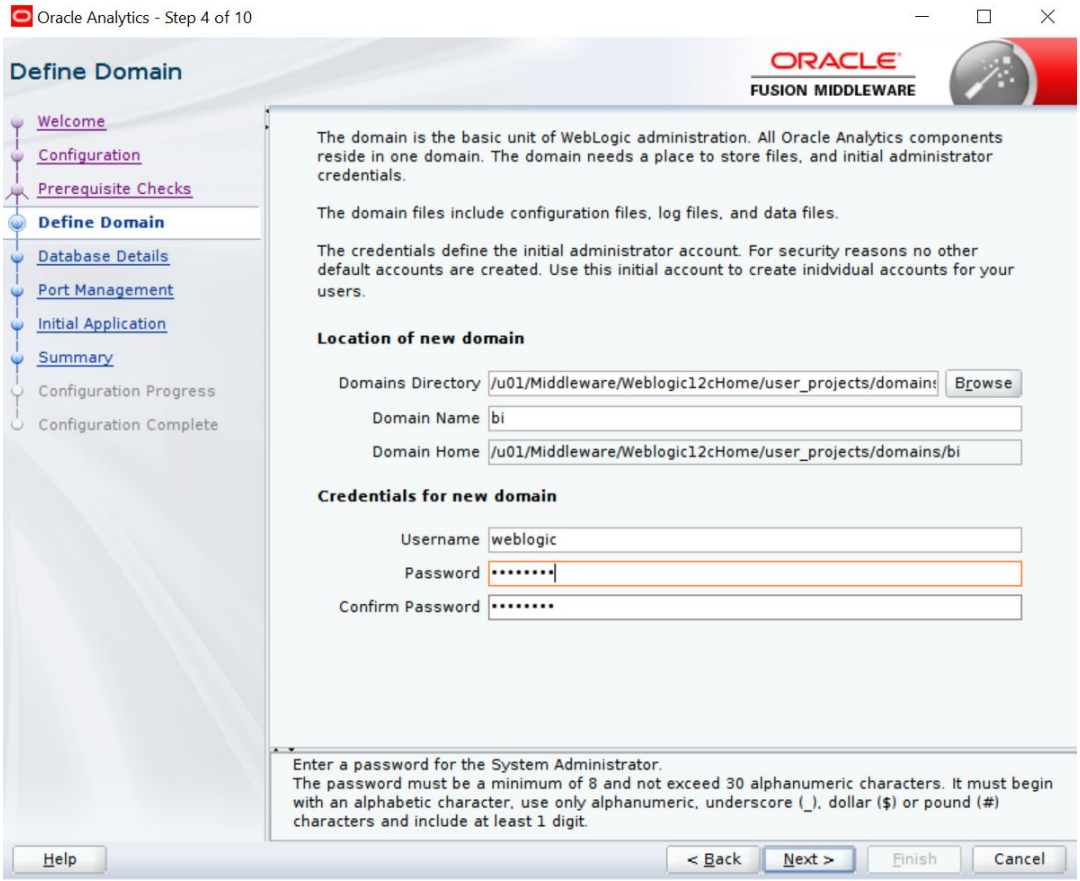
4. Click **Next**.

   The following window is displayed.

Figure 2-3 Prerequisite Checks

5. Enter the User Name, Password and Domain Name for OA Publisher domain. Click **Next**. The following window is displayed.

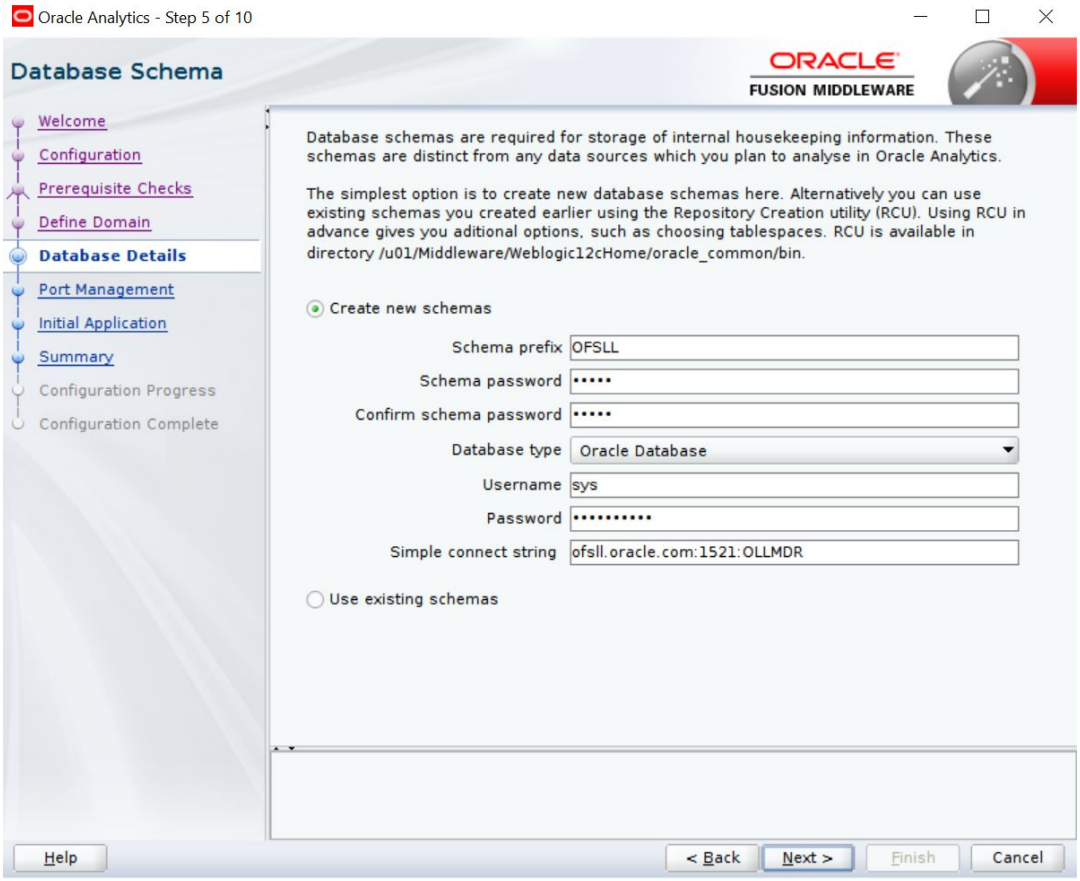
Figure 2-4 Define Domain



6. Select the option **Create New Schema** and specify the Schema prefix, Schema password, database type, user name, password, simple connect string.
7. Click **Next**.

   The following window is displayed.

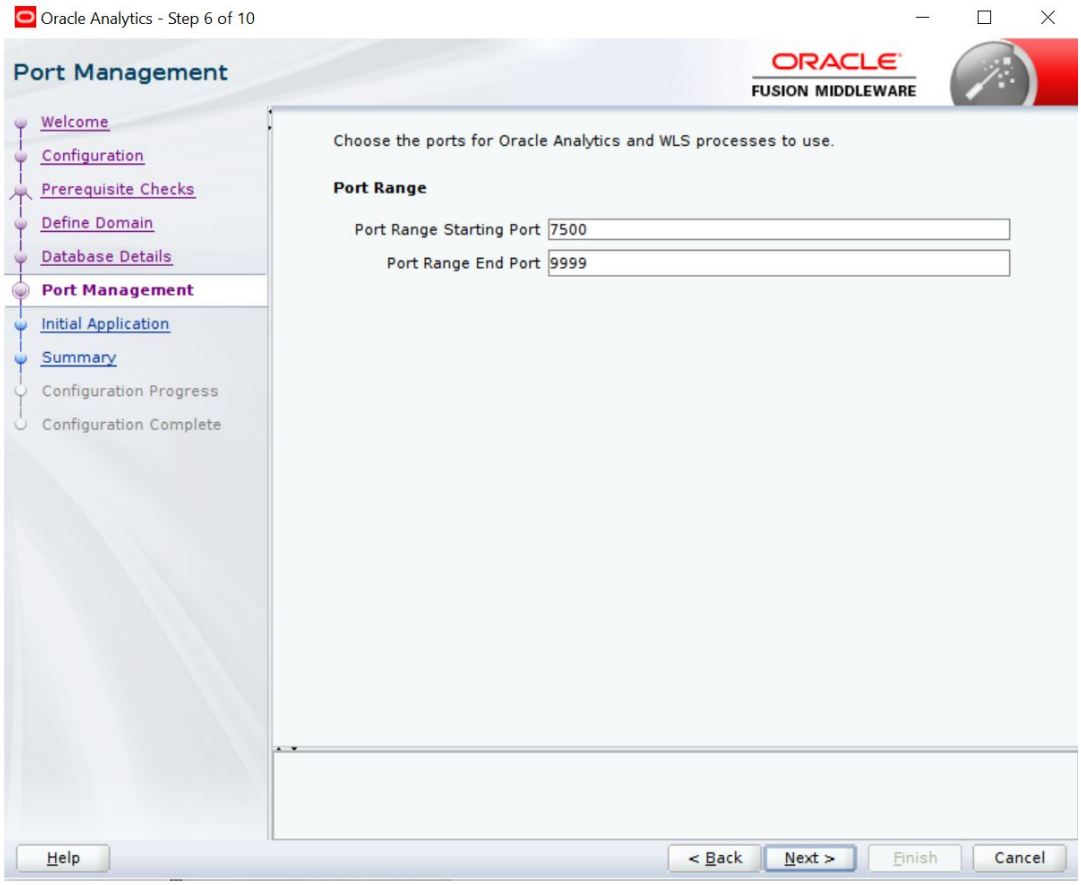
Figure 2-5 Database details



8. Click **Next**.

   The following window is displayed.

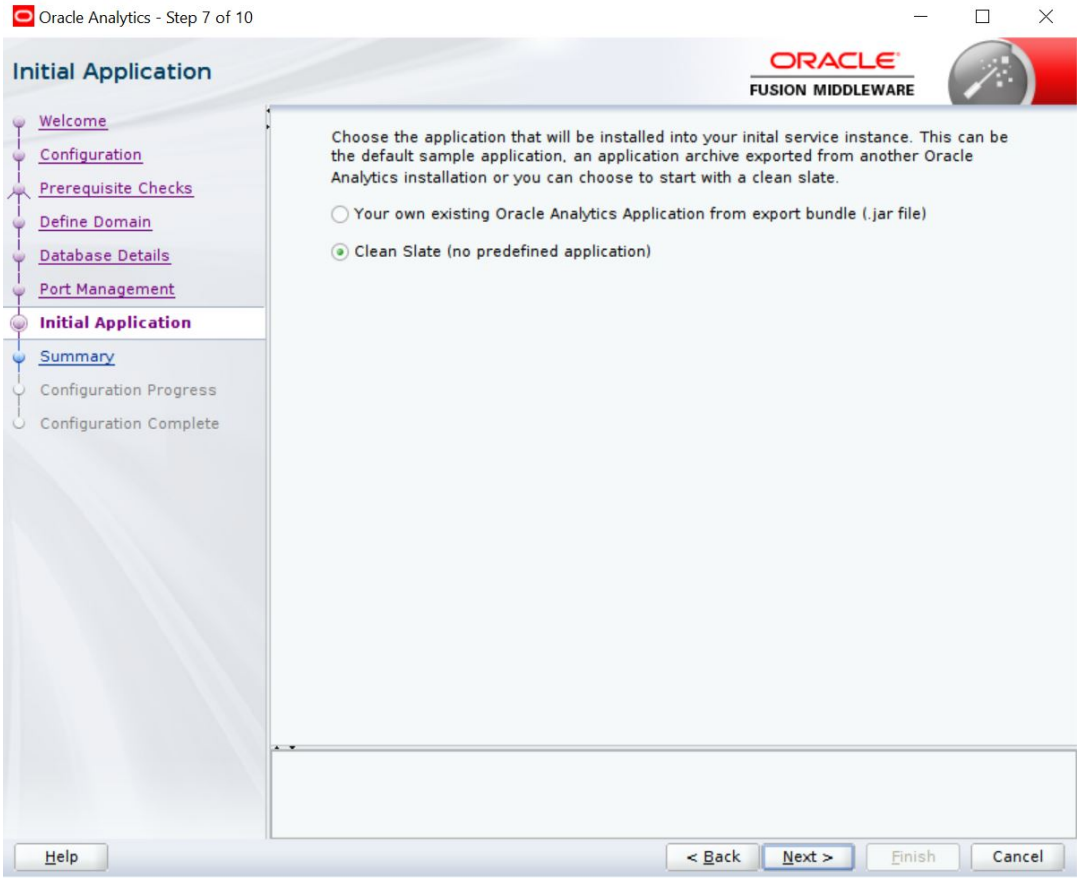
Figure 2-6 Port Management



9. Click **Next**.

   The following window is displayed.

Figure 2-7 Initial Application



10. Click **Configure**.

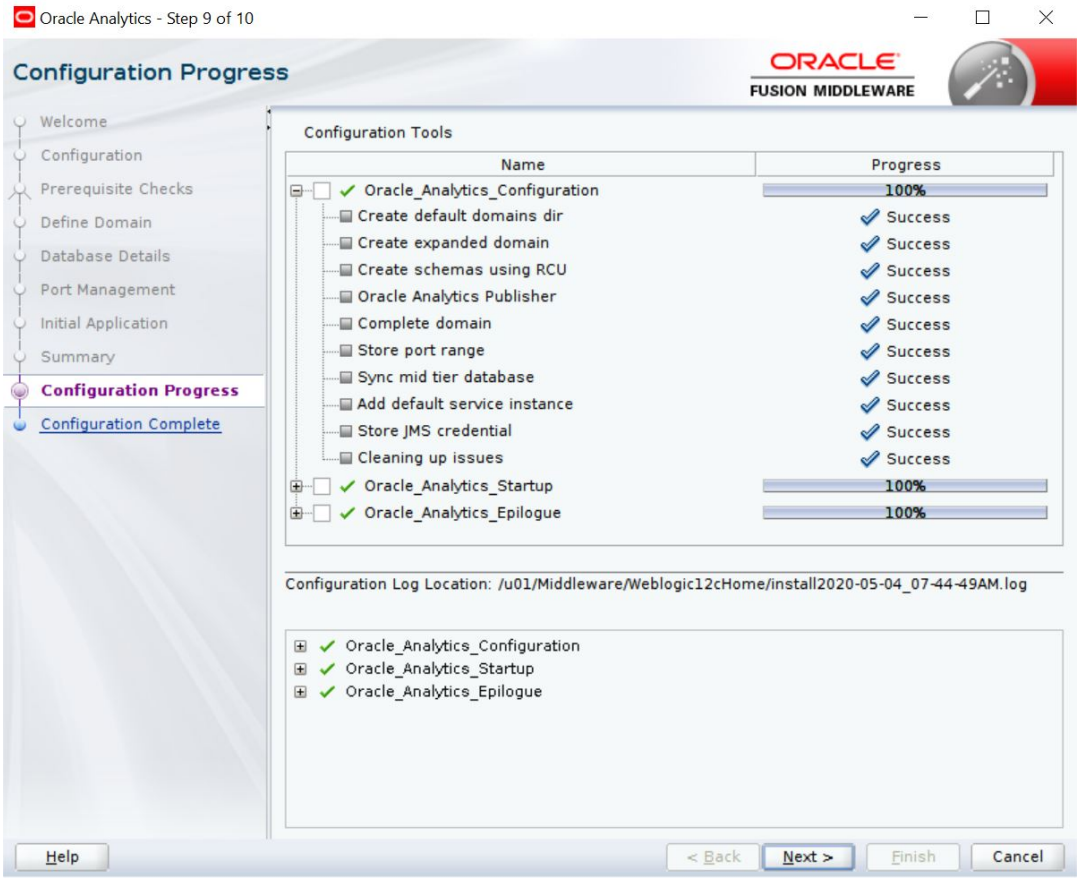
    The following window is displayed.

Figure 2-8 Summary

11. Click **Next**.

    The following window is displayed .

Figure 2-9 Configuration Progress



12. Click **Save** and save the Response File.
13. Click **Finish**. The application will create a new domain for OA Publisher with the details as highlighted in the above screen.

2.2 Verifying Successful OA Publisher Deployment

Successful OA Publisher deployment can be verified by launching the OA Publisher URL `http://hostname:<port>/xmlpserver` .

3
Create OA Publisher Datasource

The following sections details the steps to be followed to create OA Publisher Datasource.

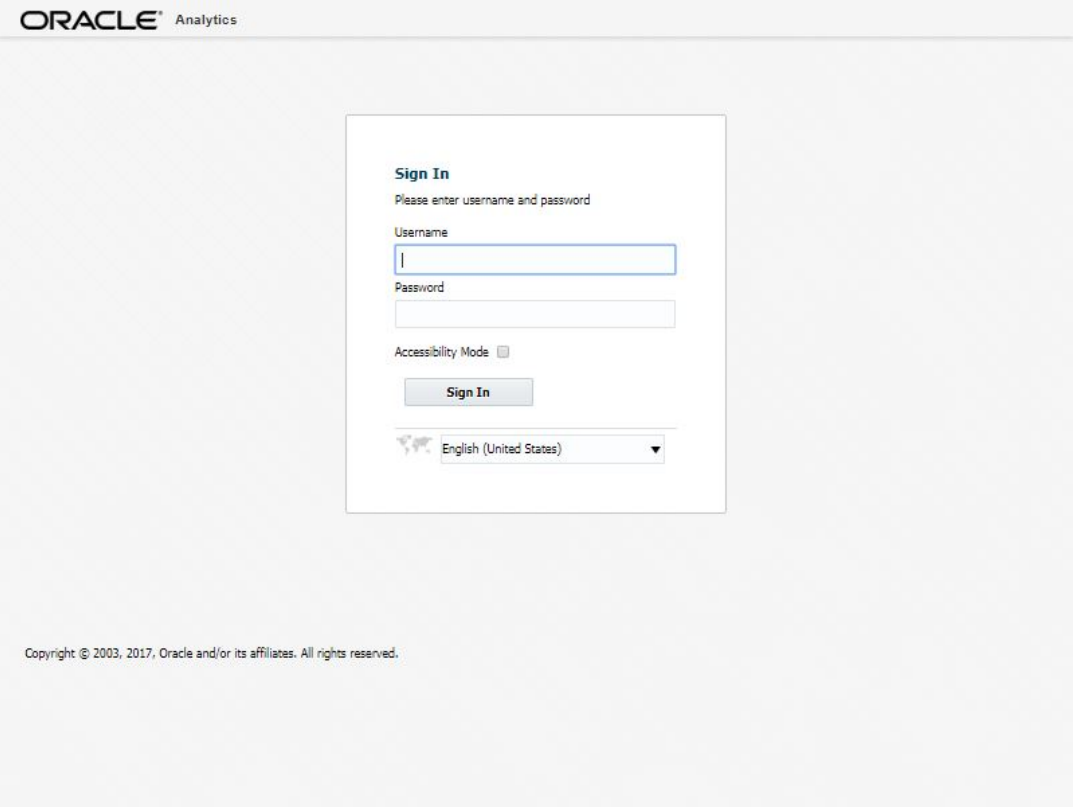
- Creating OA Publisher Datasource
- Creating Roles

3.1 Creating OA Publisher Datasource

To create OA Publisher Datasource, do the following:

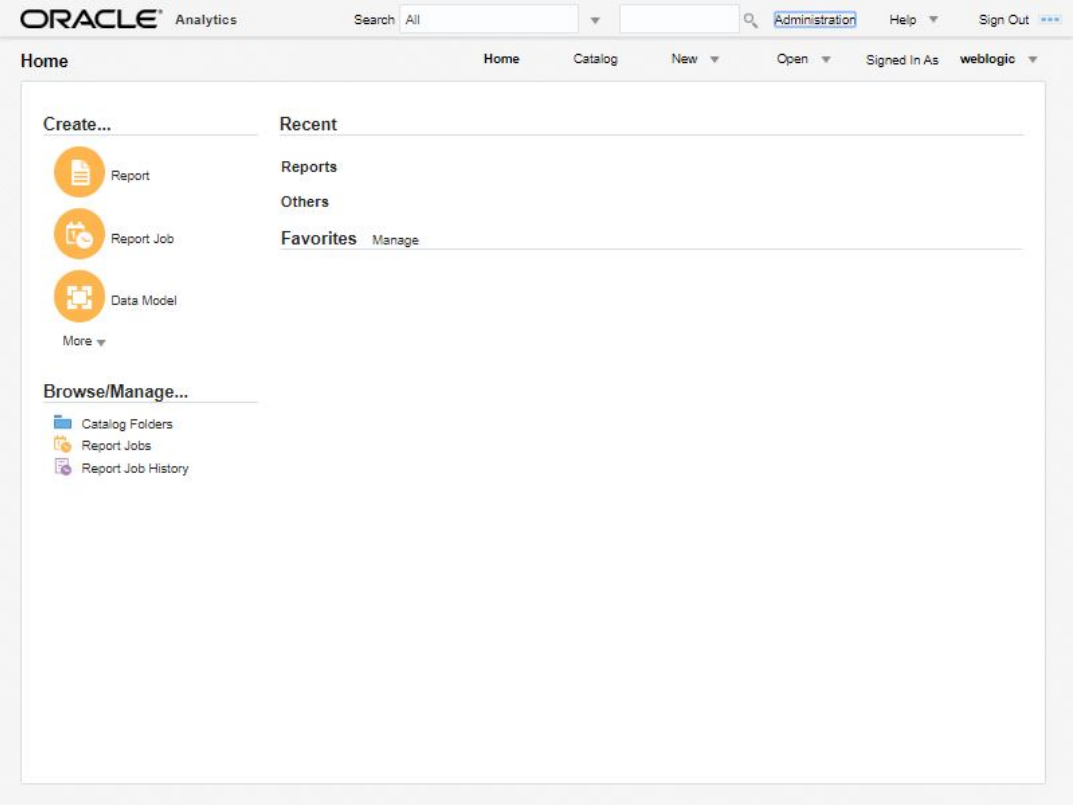
1. Access the console URL using `http://hostname:<port>/xmlpserver`.

Figure 3-1 Sign in page



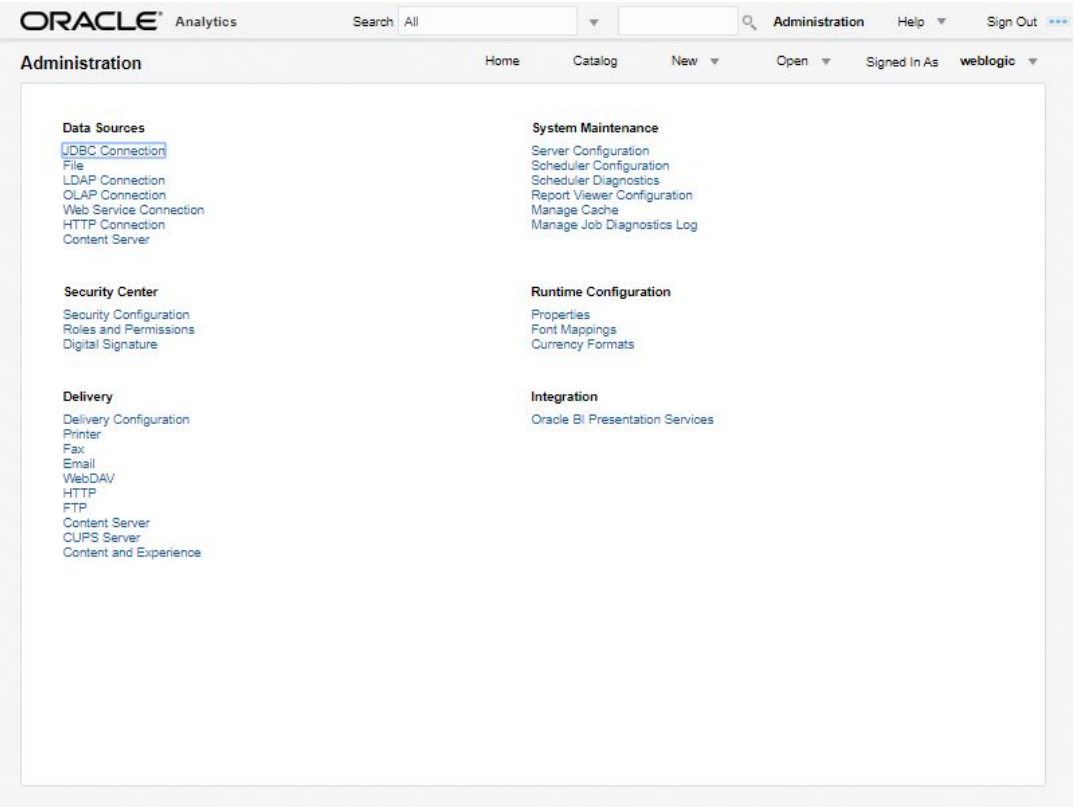
2. The following window is displayed. Click Administration option on the header.

Figure 3-2 Home page



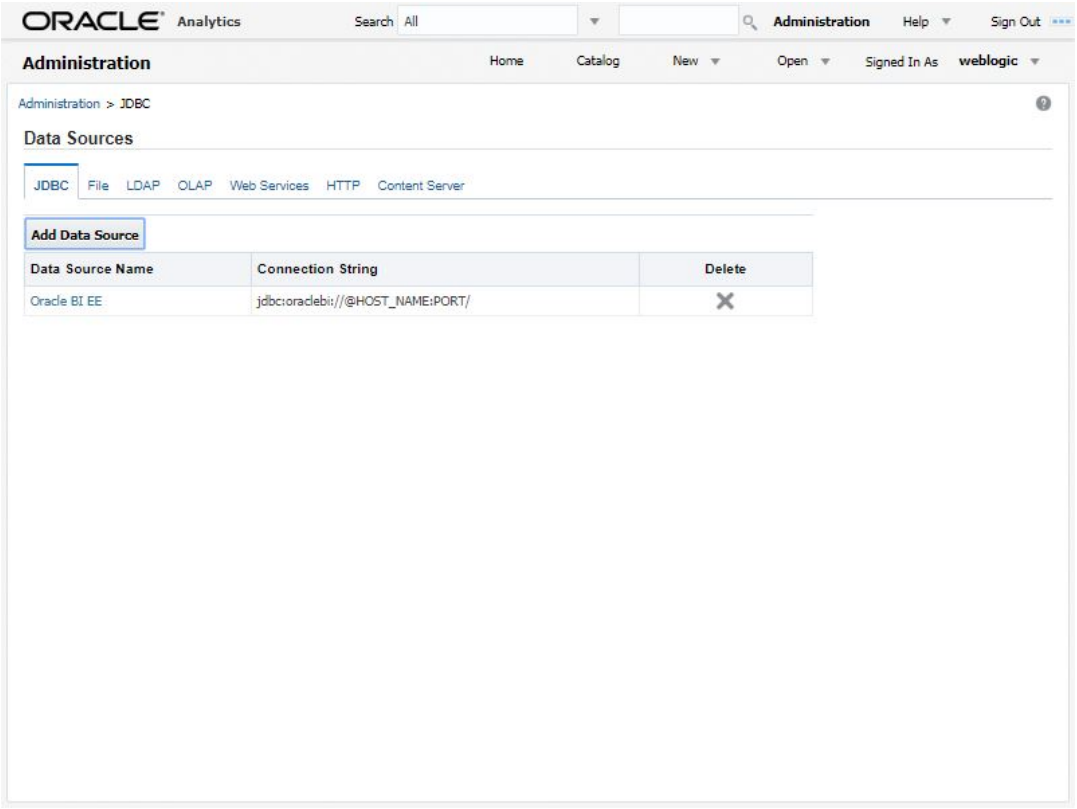
3. Click on **JDBC Connection**.

Figure 3-3 Administration page



4. Click **Add Data Source**.

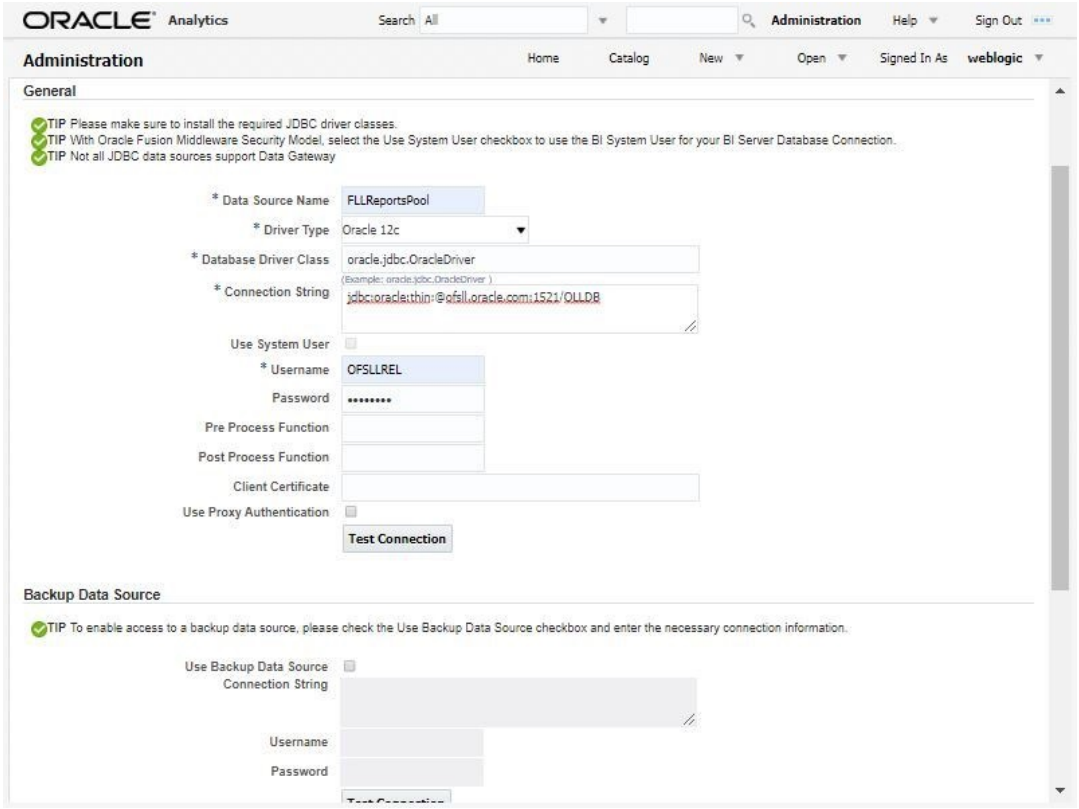
Figure 3-4 JDBC page



5. Add the following details:
   - Specify Data Source Name as **FLLReportsPool**.
   - Click on **Test Connection**.
   - Under **Security** section, select **BI Author Role** and **BI Consumer Role** from Available Roles and assign them as Allowed Roles.

> **Note:**
>
> If “BI Author” and “BI Consumer” roles are not displayed in the ‘Available Roles’ section, you need to create the roles as explained in following ‘Creating Roles’ section

Figure 3-5 Details page



6. Click **Apply**.

3.2 Creating Roles

The following sections details the steps to be followed to create “BI Author” and “BI Consumer” roles which are used to define security roles while creating Data Source on OA Publisher.

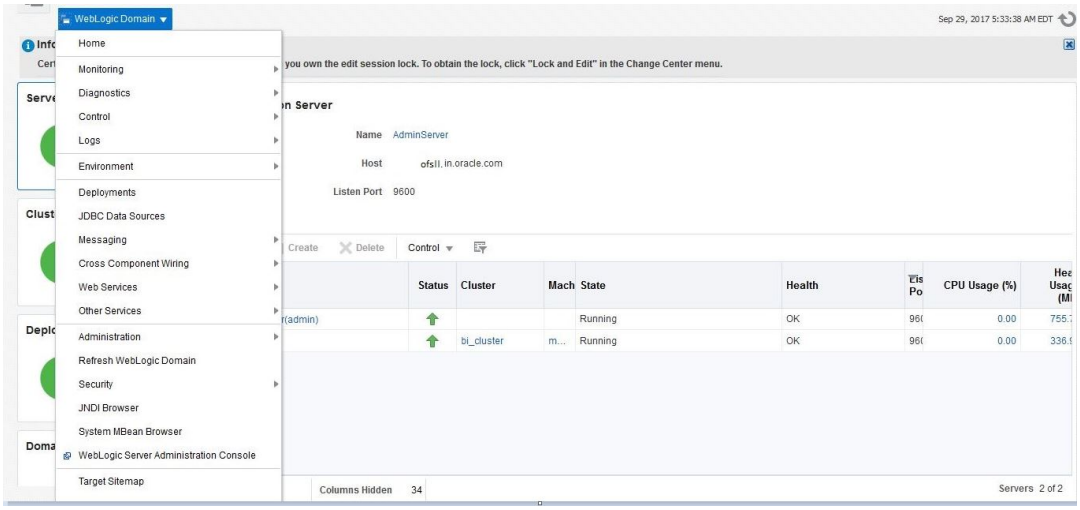
- Creating WebLogic Application Role
- Creating WebLogic Application Policies

3.2.1 Creating WebLogic Application Role

To create WebLogic Application Role

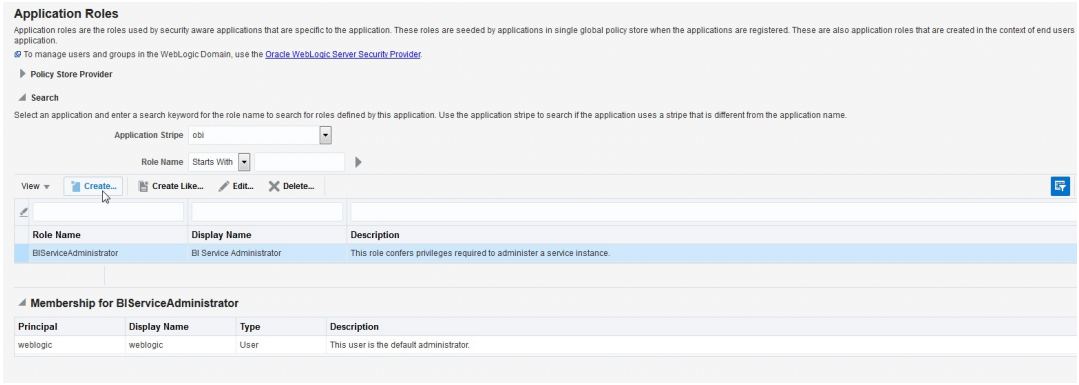
1. Login to Enterprise Manager using the URL - `http://hostname:port/em`.
2. Select Weblogic Domain > Security > Application Roles as indicated in the following screen.

Figure 3-6 WebLogic Application Role 1



3. In the Application Stripe field, select **obi** from the drop-down list. The option **OAServiceAdministrator** is added by default. Click **Create**.

Figure 3-7 WebLogic Application Role 2

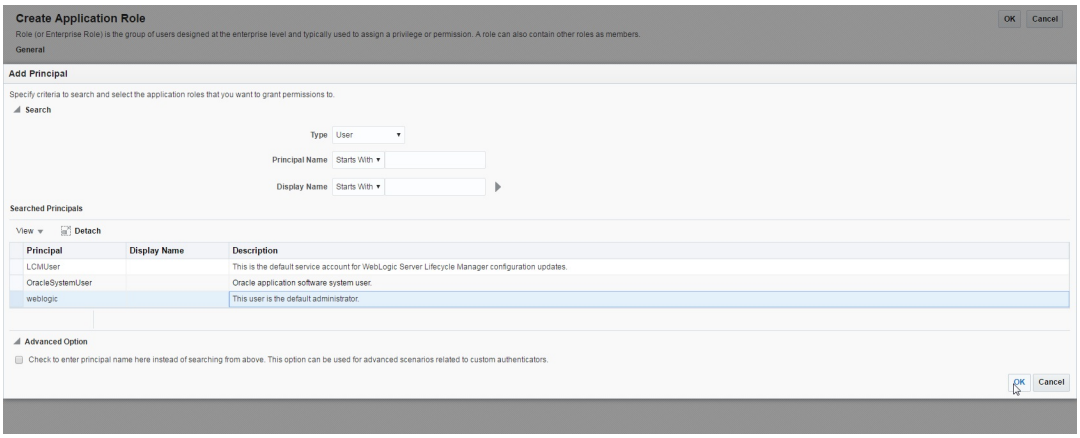


4. Specify the following details:
   - Role Name
   - Display Name
   - Description

Figure 3-8 WebLogic Application Role 3

5. Click **Add** to add the application role to the members family. The same can later be mapped to required Users or Groups defined in Enterprise LDAP server, or the role can be mapped to other application roles.

Figure 3-9 WebLogic Application Role 4

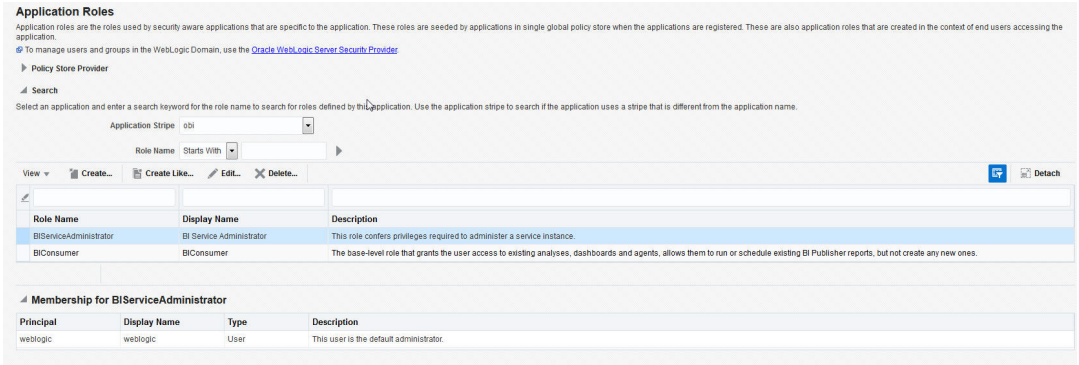


6. Add the Weblogic User by selecting **weblogic** in the **Searched Principals** section and click **OK**. The Weblogic User is added to the application role.

Figure 3-10 WebLogic Application Role 5

7. Click **OK**. The new role is added to the list of application roles.

Figure 3-11 WebLogic Application Role 6

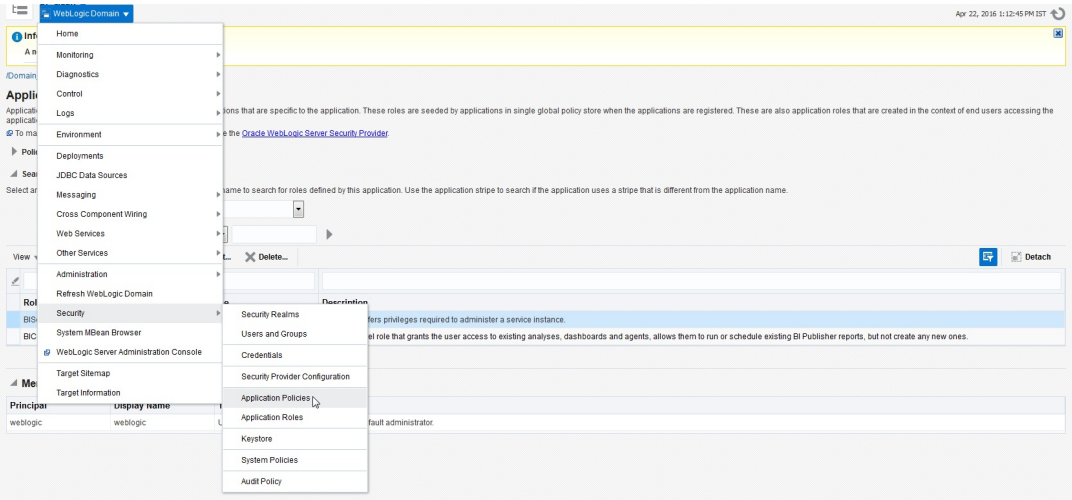


3.2.2 Creating WebLogic Application Policies

To Create WebLogic Application Policies

1. Login to Enterprise Manager using the URL - `http://hostname:port/em`.
2. Select Weblogic Domain > Security > Application Policies as indicated in the following screen:

Figure 3-12 WebLogic Application Policies 1

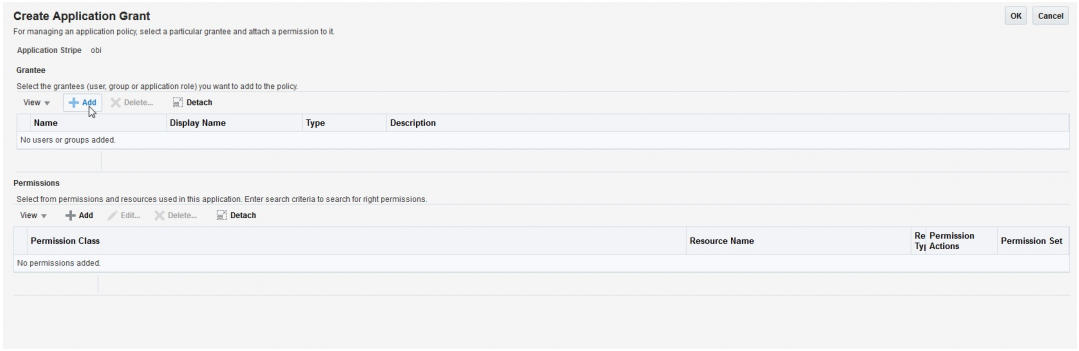


3. In the Application Stripe field, select **obi** from the drop-down list. Click **Create**.

Figure 3-13 WebLogic Application Policies 2

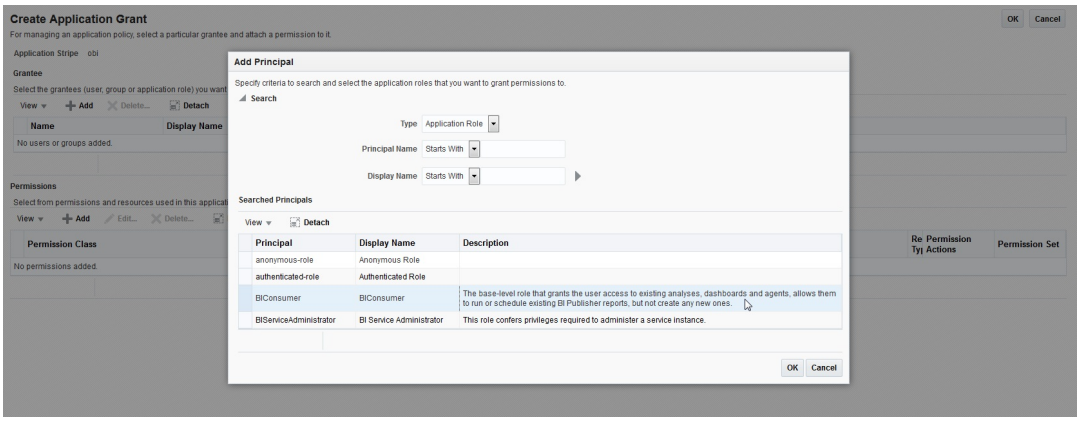
4. In **Create Application Grant** screen, under the Grantee section, click **Add**.

Figure 3-14 WebLogic Application Policies 3



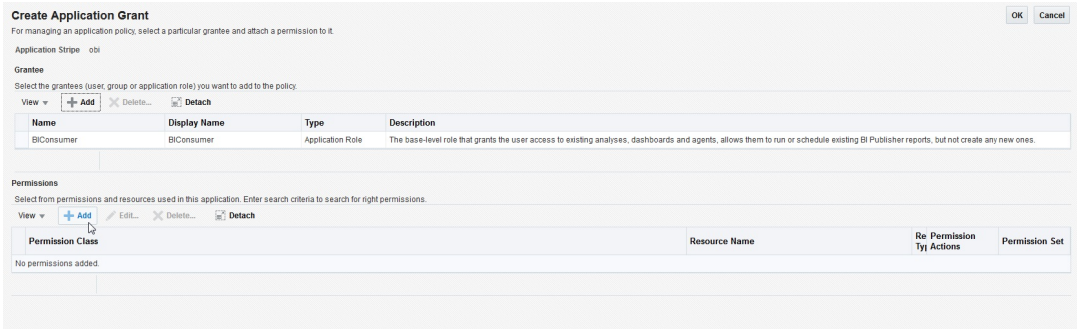
5. Select the newly created application role from the list and click **OK**. The new role is added to the list.

Figure 3-15 WebLogic Application Policies 4



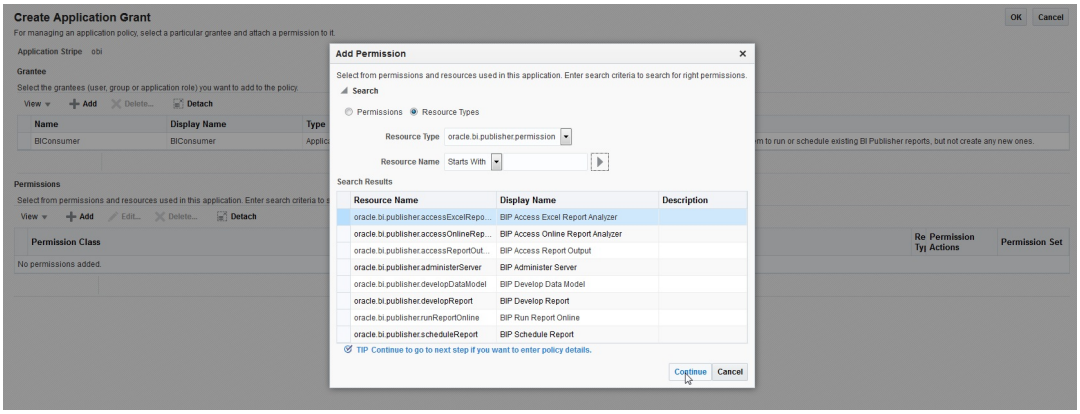
6. In the **Permissions** section, click **Add**.

Figure 3-16 WebLogic Application Policies 5



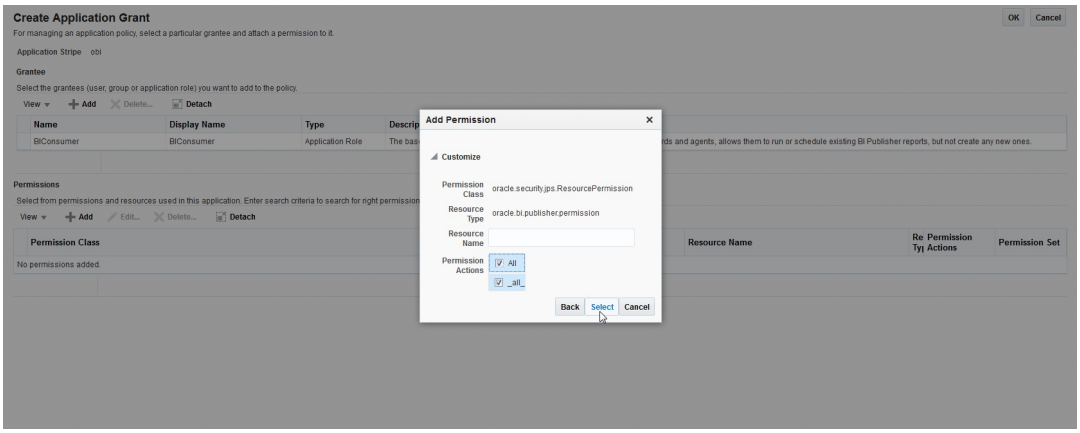
7. In the search criteria, select **Resource Type** and select the resource type from the drop-down list. Select the required resource from the search results and click **Continue**.

Figure 3-17 WebLogic Application Policies 6



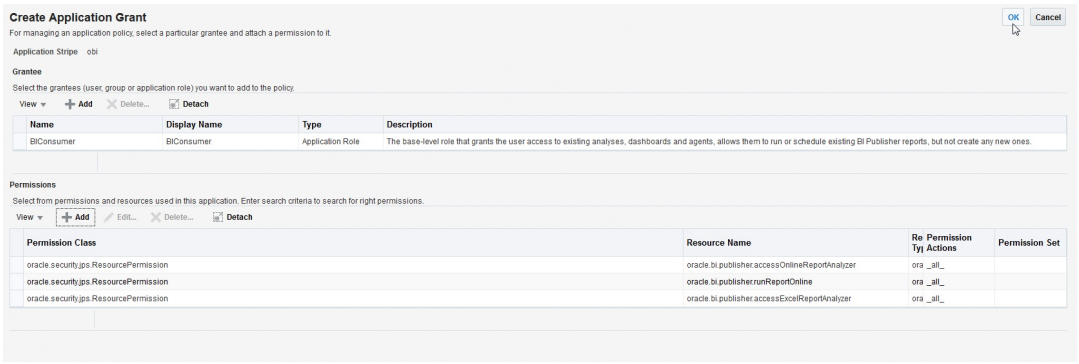
8. Define the required permission(s) for the application role by selecting the appropriate Permission Class and Permissions Actions check box. Click **Select**.

Figure 3-18 WebLogic Application Policies 7



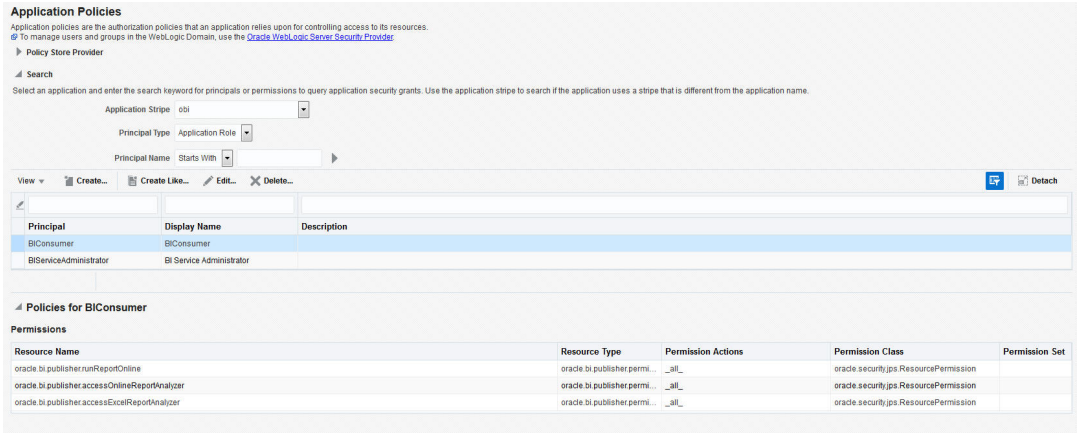
9. The selected permissions are defined to the application role. Similarly you can define the required permissions for other application roles.

Figure 3-19 WebLogic Application Policies 8



10. Once done, click **OK**.

Figure 3-20 WebLogic Application Policies 9



4

Import Reports to OA Publisher Server

The following section details how to import ofsll application reports to OA Publisher Server.

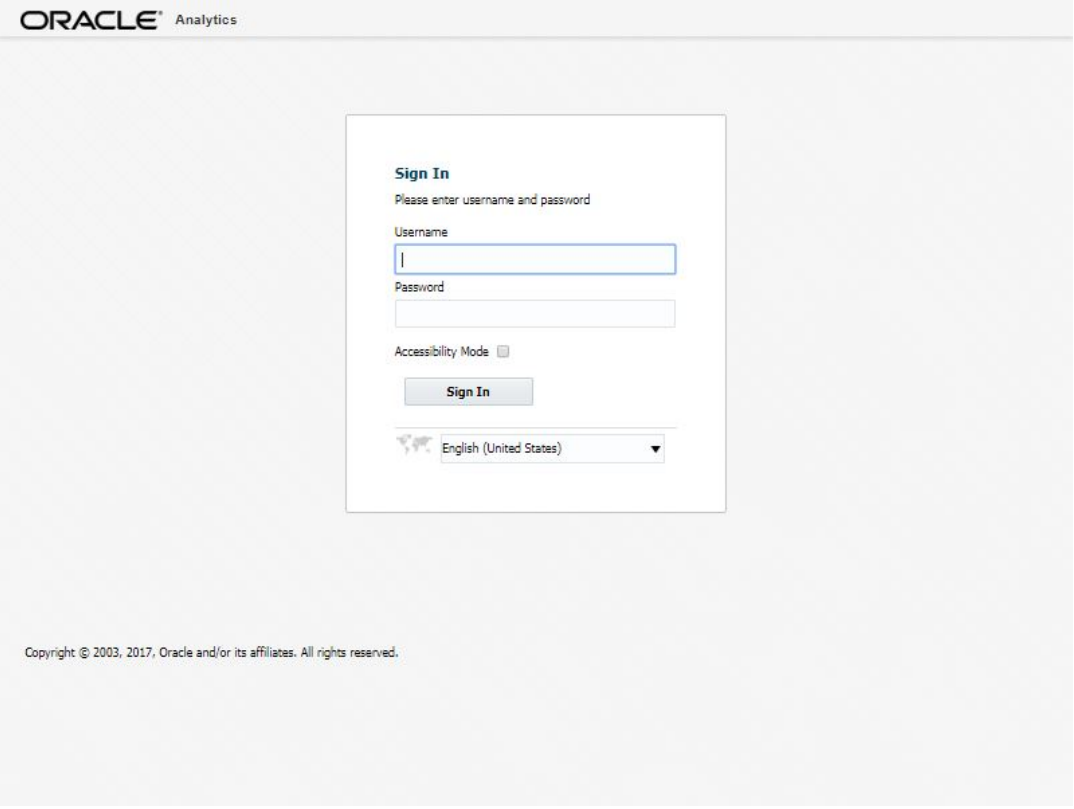
- Importing Reports to OA Publisher Server

4.1 Importing Reports to OA Publisher Server

To import ofsll application reports to OA Publisher Server, do the following:

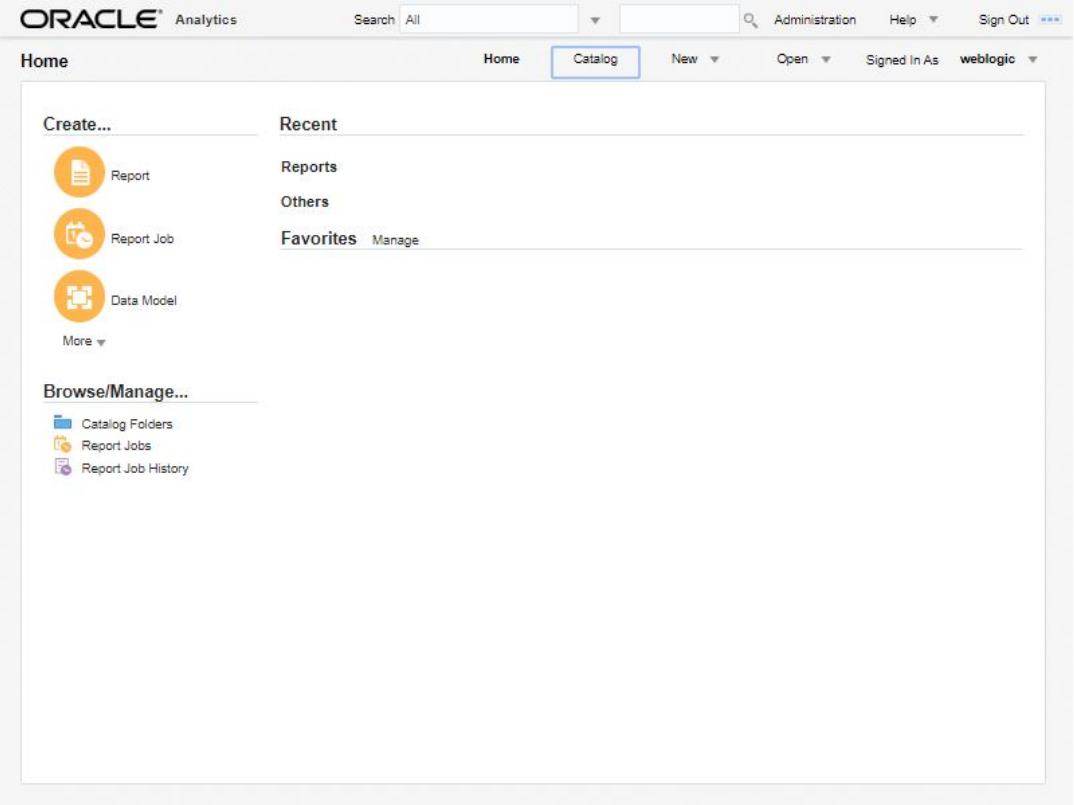
1. Copy and extract the OFSLLReports.zip file to staging area.
2. Launch the Oracle Analytics Intelligence Publisher Application using `http://hostname:port/xmlpserver`.
3. Login with valid credentials.

Figure 4-1 OA Publisher Server 1



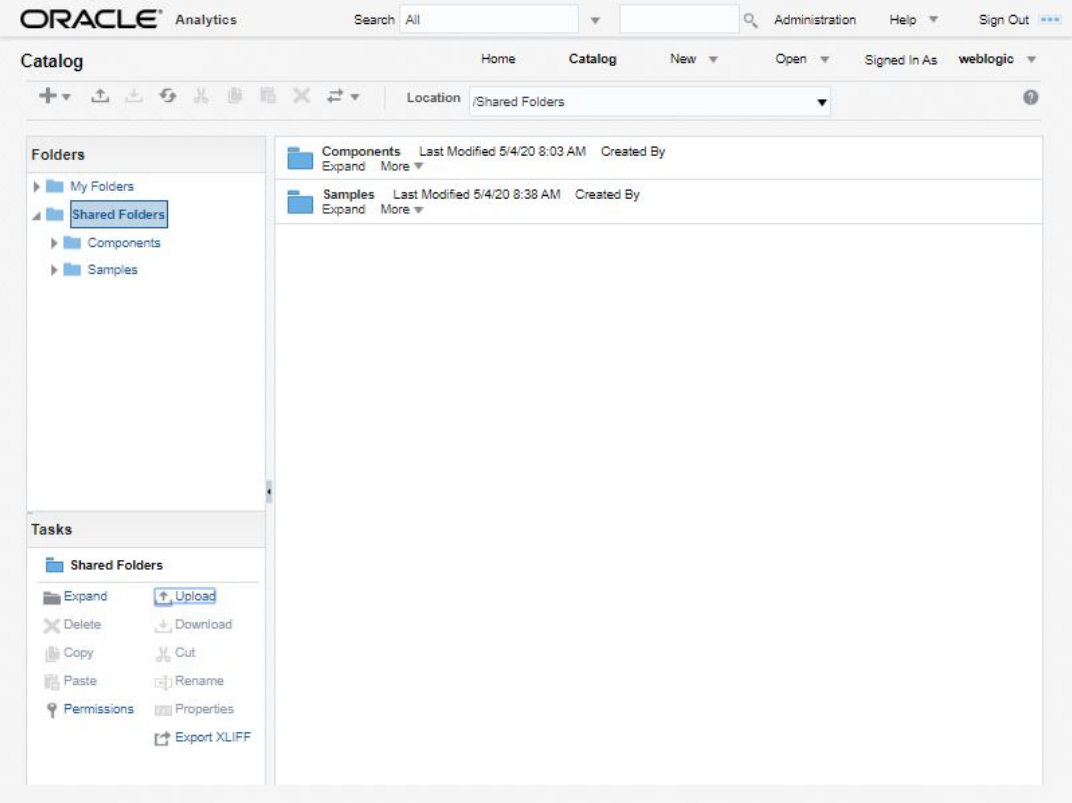
4. Following window is displayed. Click on **Catalog Folders** on the left pane.

Figure 4-2 OA Publisher Server 2



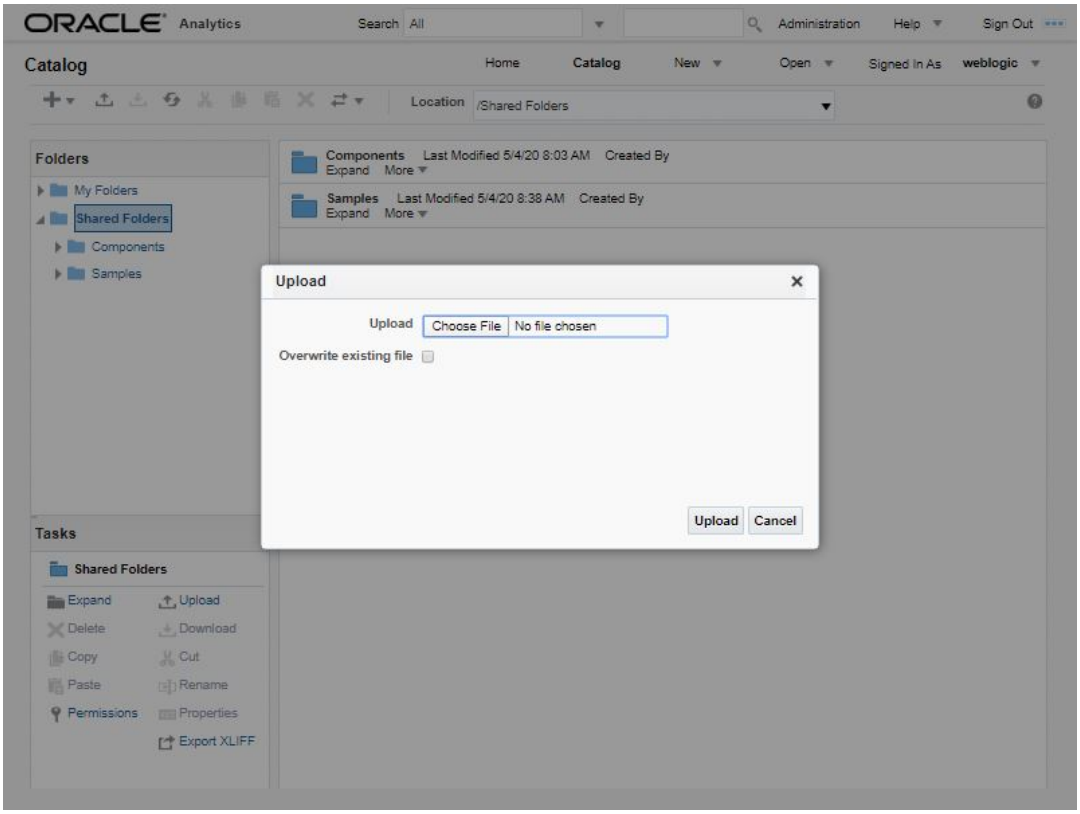
5. Click on **Shared Folders** option and then click **Upload**.

Figure 4-3 OA Publisher Server 3



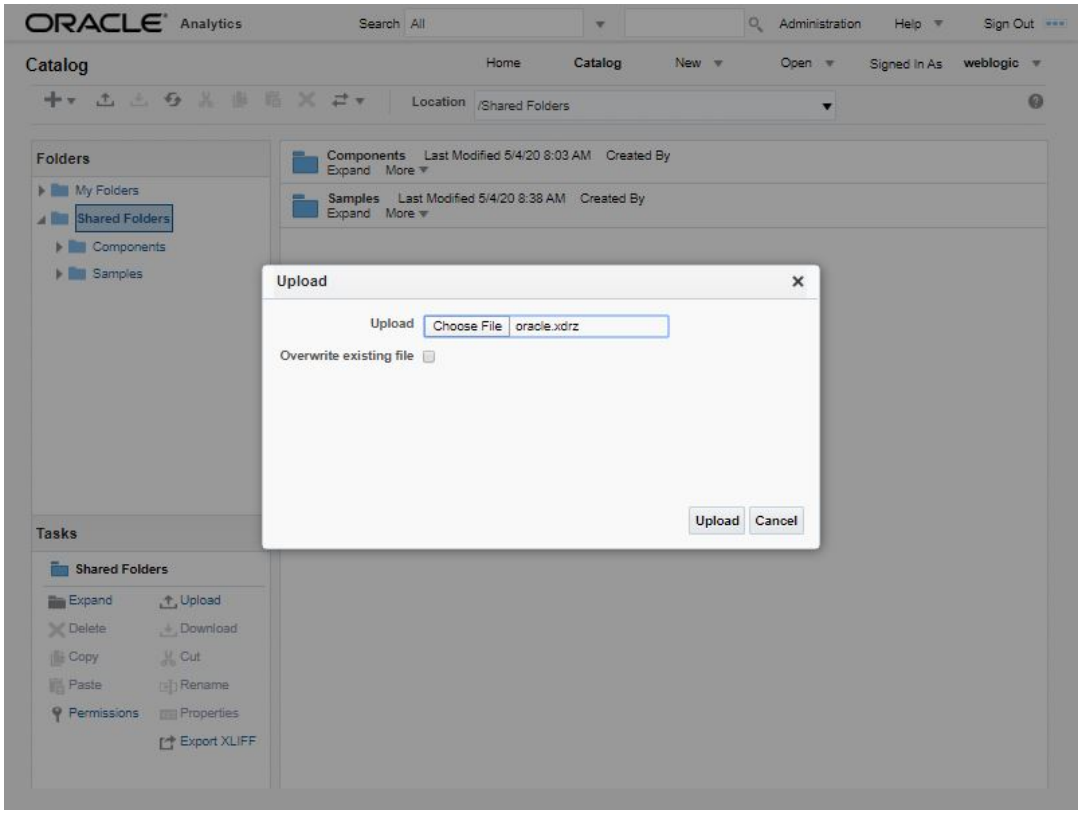
6. The following window is displayed. Browse to the location where the `oracle.xdrz` file is saved. Click the **Overwrite Existing File** check box if you are overwriting an existing directory.

Figure 4-4 OA Publisher Server 4



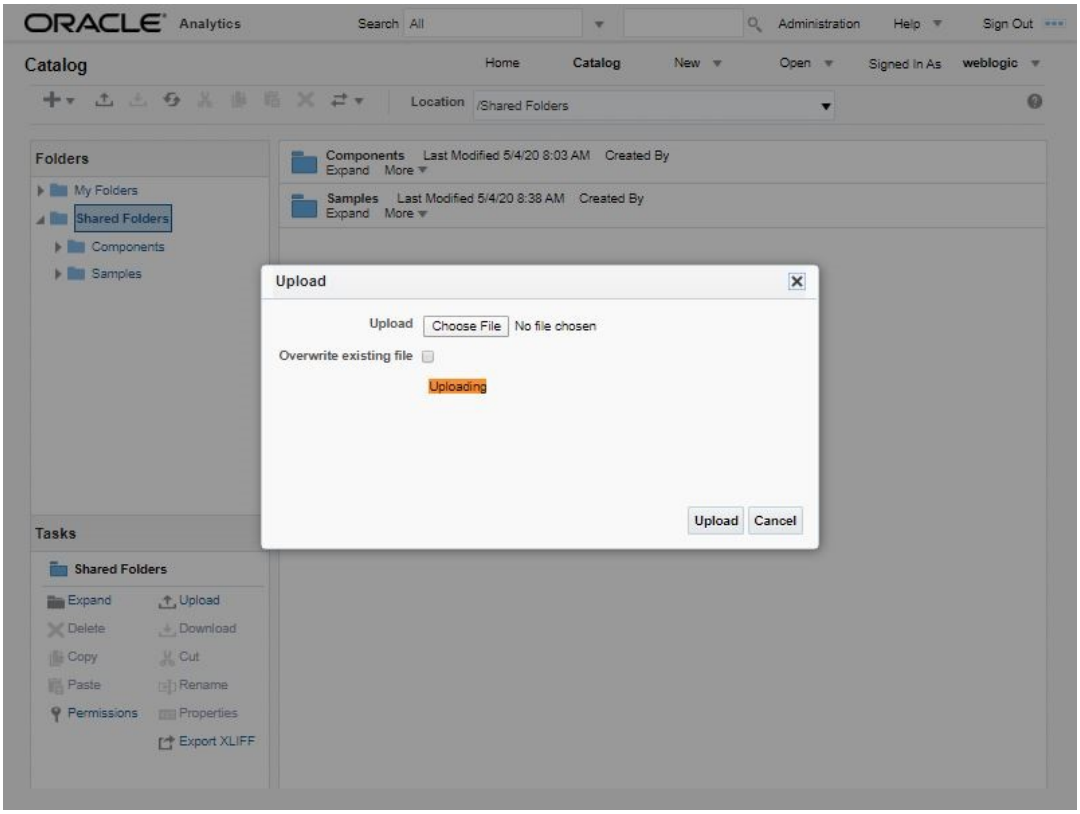
7. Click on **Upload**.

Figure 4-5 OA Publisher Server 5



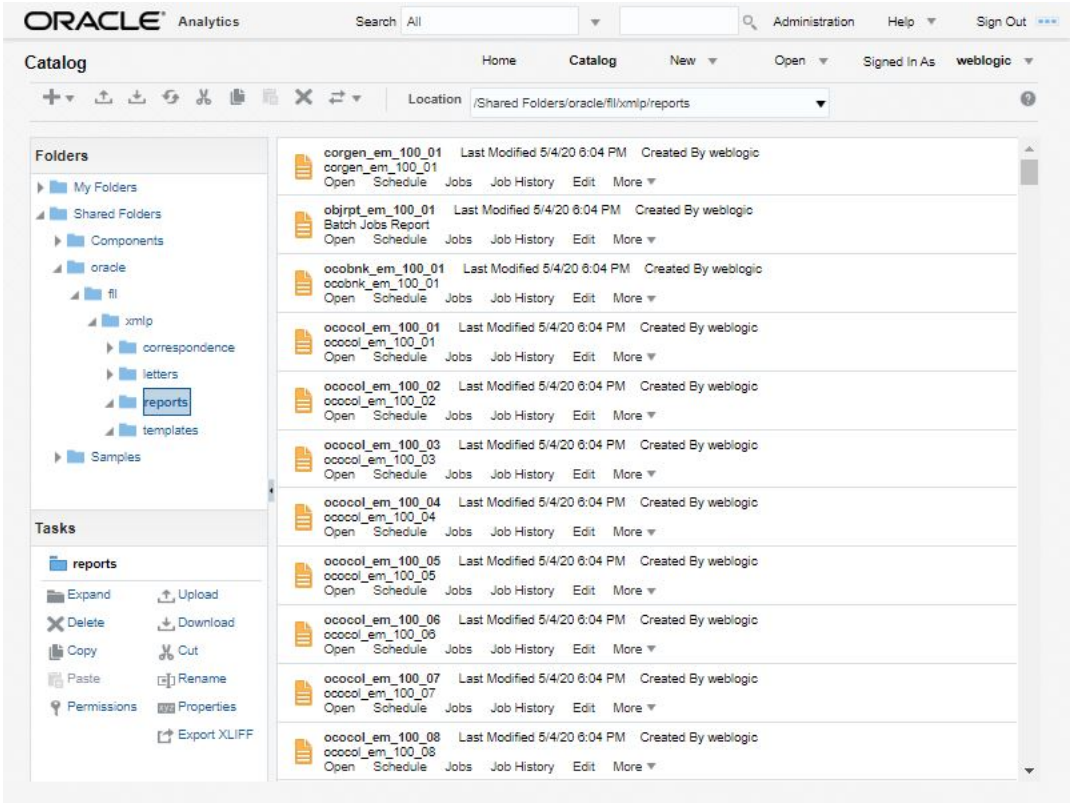
8. The following window is displayed.

Figure 4-6 OA Publisher Server 6



9. Once the upload is completed, click any folder to see the list of reports under the directory. The following window is displayed.

Figure 4-7 OA Publisher Server 7



5
Configure MDB Mail Server

The following section details the steps to configure the MDB (Message Driven Bean) email server.

- Configuring MDB Mail Server

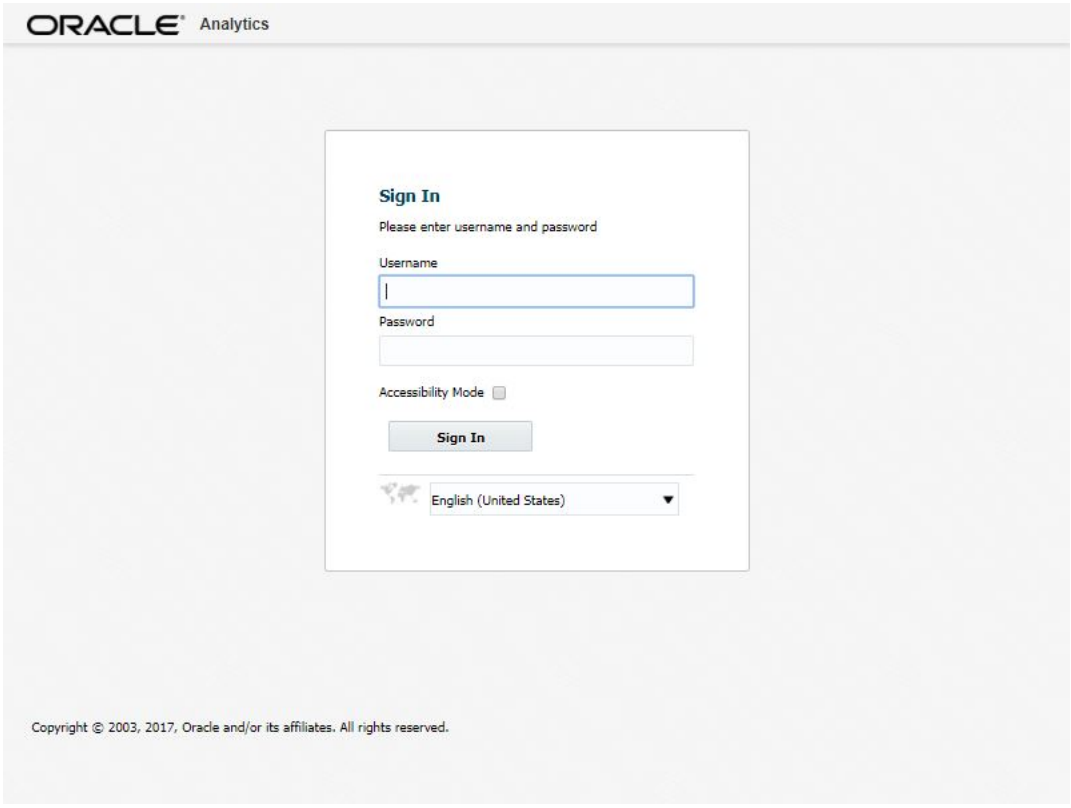
5.1 Configuring MDB Mail Server

Refer to the following instructions to configure the MDB email server. This is required for outbound email communications.

1. Launch the Oracle Analytics Publisher application (`http://hostname:port/xmlpserver`).

   The following window is displayed.

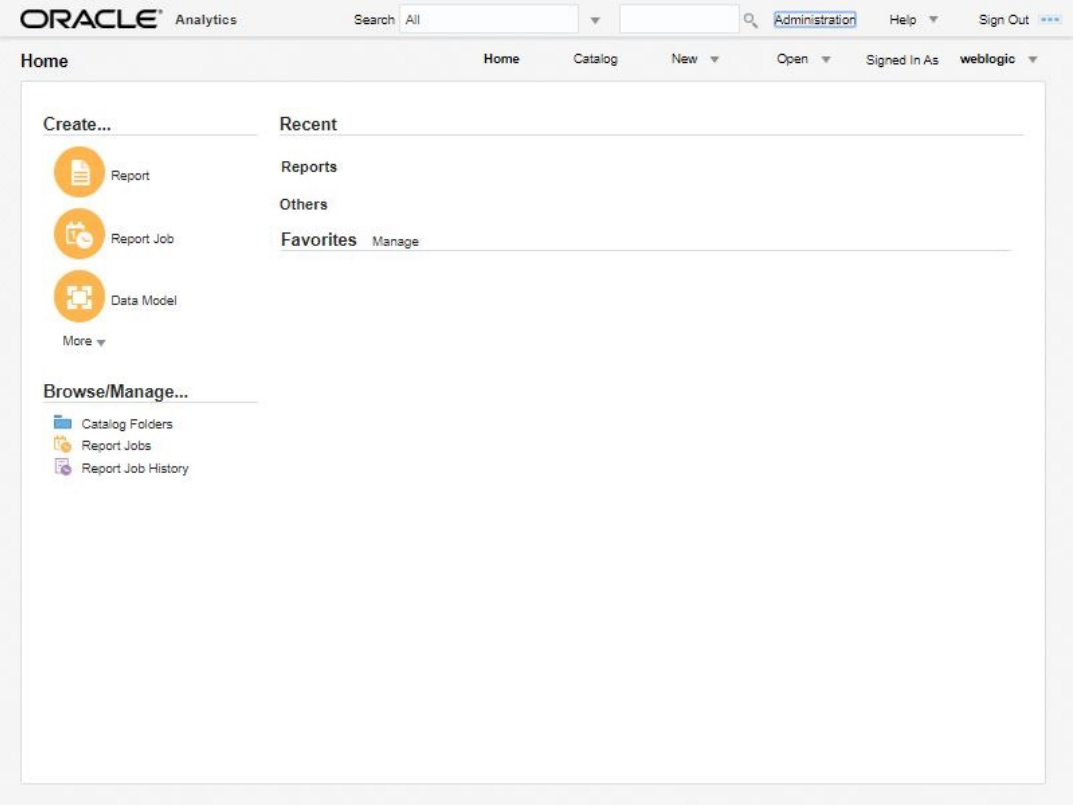
Figure 5-1 MDB Mail Server 1



2. Login using the valid credentials.

   The following window is displayed.

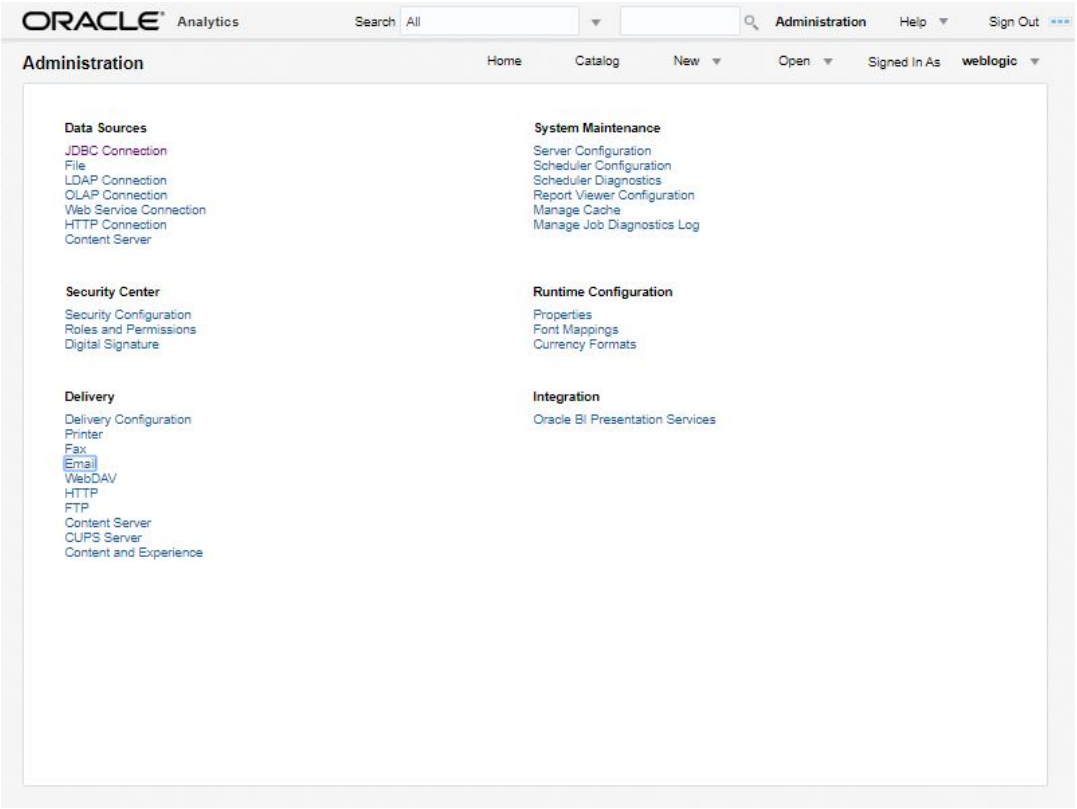
Figure 5-2 MDB Mail Server 2



3. Click **Administration**.

   The following window is displayed.

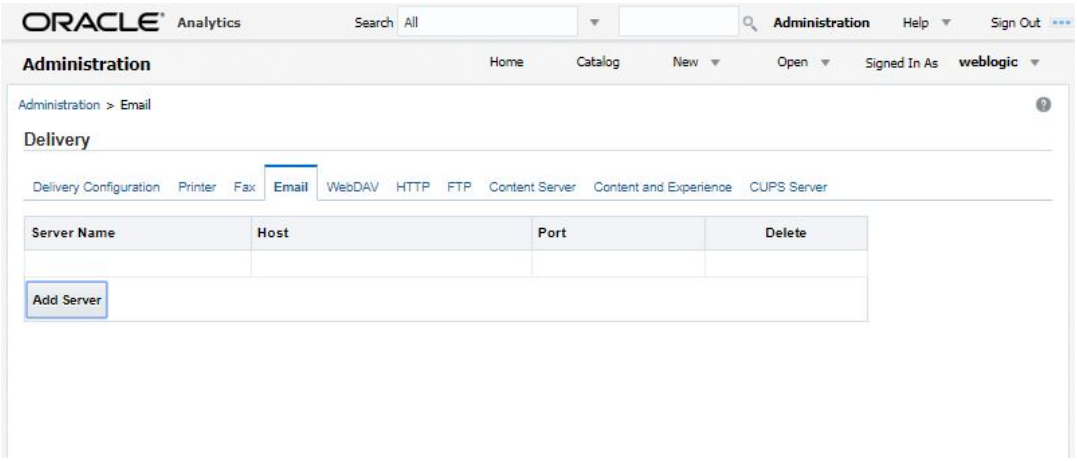
Figure 5-3 MDB Mail Server 3



4. Click **Email**.

   The following window is displayed.

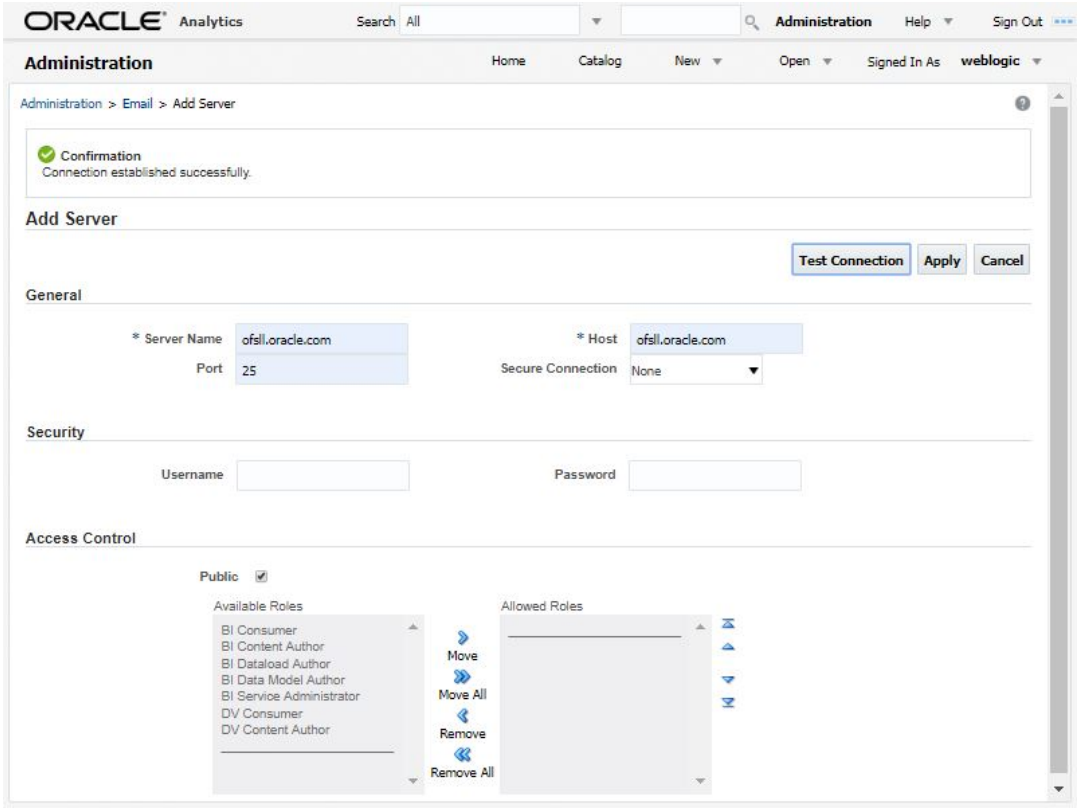
Figure 5-4 MDB Mail Server 4



5. Click **Add Server**.

   The following window is displayed.

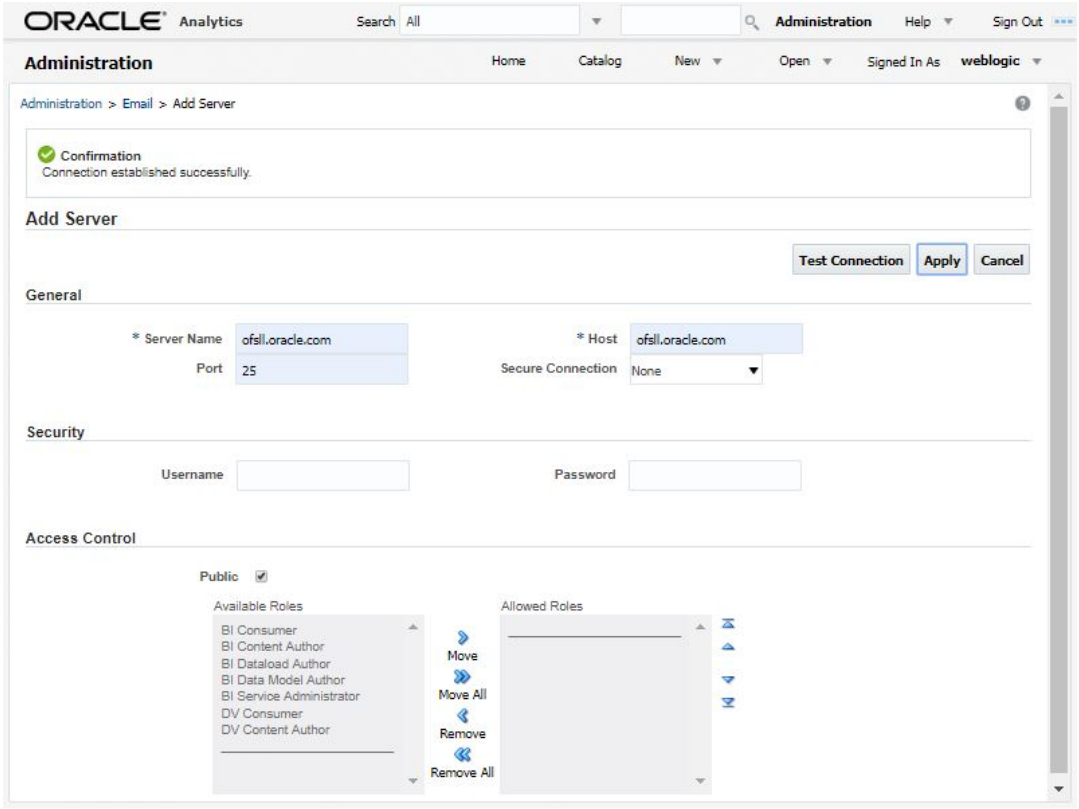
Figure 5-5 MDB Mail Server 5



6. Specify the Server details (server name, host, and port number) and click **Test Connection**. On completion, a confirmation message is displayed as indicated.
7. Click **Apply**.

   The following window is displayed.

Figure 5-6 MDB Mail Server 6



8. The MDB email server is successfully added as indicated.

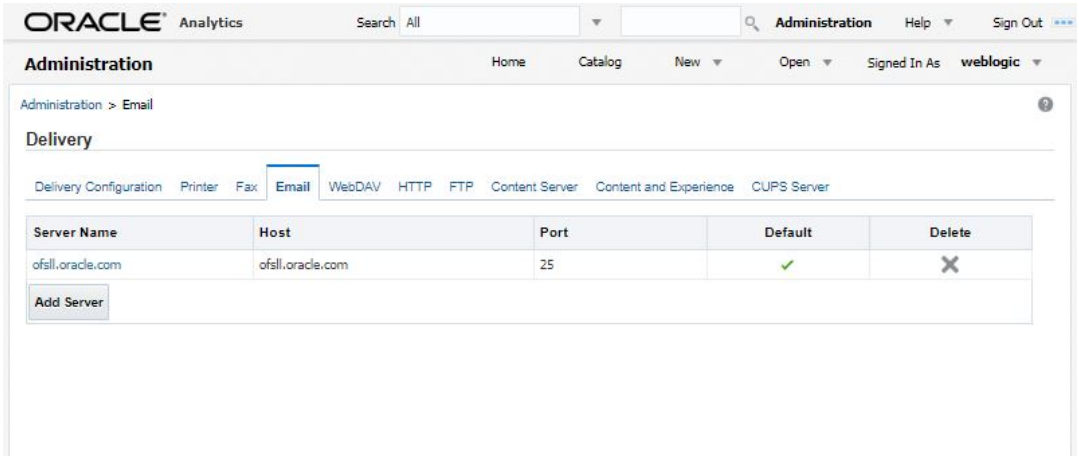



Figure 5-7 MDB Mail Server 7